T O U R I S M

THE COMMERCIAL WILDLIFE VIEWING PRODUCT

A Discussion of Market and Development Potential.

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

91-04209/

THE COMMERCIAL WILDLIFE VIEWING PRODUCT

A Discussion of Market and Development Potential

Prepared for

Ministry of Tourism

Prepared by

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Tourism Research Group
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January, 1991

ACKNOWLEDGEMENTS

This study was funded through the Canada-British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost-shared equally by the governments of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a Federal/Provincial Management Committee Established for the administration of the Agreement.

The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreements (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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British Columbia
Ministry of Regional and Economic Development

British Columbia
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Canadian Cataloguing in Publication Data

Main entry under title:
The Commercial wildlife viewing product

"Funded by Canada - British Columbia Tourist Industry Development Subsidiary Agreement."
On cover: Economic & Regional Development Agreement, Canada, BC.
ISBN 0-7718-8971-2

1. Wildlife watching - Economic aspects. 2. Tourist trade. I. Canada. Industry, Science and Technology Canada. II. British Columbia. Ministry of Tourism. III. British Columbia. Ministry of Regional and Economic Development. IV. BioQuest International Consulting Ltd. V. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. VI. Canada/BC Economic & Regional Development Agreement.

QL60.C65 1990 381'.45333954 C90-092244-3

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1. INTRODUCTION

BACKGROUND

The viewing of wildlife is a major leisure activity today. In Canada, about 20% of the population undertakes trips for the primary purpose of observing wildlife - by contrast about 10% participate in hunting. (Filion et al, 1983). In addition to primary wildlife viewing trips, about 44% of Canadians participate in non-hunting, wildlife-related activities during trips for other purposes. In the U.S., the number of people participating in this activity grew from 83 to 110 million over the 15 year period 1970 to 1985 (U.S. Fish and Wildlife Service, 1987).

Wildlife viewing has both a non-commercial aspect (as occurs when residents enjoy watching animals at no charge around or near their homes) and a commercial one. Commercial wildlife viewing is considered to be an important component of British Columbia's burgeoning adventure tourism sector. Given the quality and diversity of this province's wildlife resource, the activity is considered to be an important area for the expansion of tourism revenues in B.C.

Currently in British Columbia wildlife viewing is in its infancy: in 1987, 17 operators earned $2.5 million primarily through wildlife viewing. However, wildlife viewing contributed a further $16.5 million as a secondary ingredient in the tourism experience offered by other adventure tourism activities such as rafting (*Wildlife Viewing in B.C.*, 1987).

This industry is still young, and the growth opportunities associated with wildlife viewing are substantial. To start with, the activity is associated with the same trends that characterize the overall adventure tourism sector. (Adventure tourism is experiential tourism that focuses on outdoor recreation activities.) Adventure tourism is the fastest growing component of the tourism industry; it is expanding at 15% per year in B.C. In 1986 adventure travel generated $135 million dollars into the B.C. economy. As such, B.C. is the market leader in North America (WTC, 1988).

Adventure tourism, and wildlife viewing in particular, caters to an affluent, well-educated urban-based international clientele. It is especially associated with professionals of the Baby Boom Generation. Since the early 1980's, this generation has created a strong demand for adventure activities. Now as this group ages, the evidence is that a preference for less strenuous activities is developing. Coincidentally, 'softer' forms of adventure, such as wildlife viewing, promise to enable a larger number of people to enjoy adventure tourism, since the skill and fitness level requirements are less.

Given this trend, those activities with the greatest ability to provide such softer experiences will be the ones most in demand. Wildlife viewing in particular will benefit from this trend. As a result, this activity is forecast to have the strongest growth potential within the adventure travel sector in western Canada (Tourism Canada, 1988).

A further factor which suggests that wildlife viewing will thrive relates to the strong emergence of environmental concern. The opportunity to learn more about and experience the natural world has spawned numerous "eco-tourism" operations. Wildlife viewing is a core aspect of such eco-tourism.

GOVERNMENT INITIATIVES

Recognizing the potential represented by wildlife viewing, the B.C. Government has undertaken several initiatives. In 1988, a report entitled *Wildlife Viewing in British Columbia: The Tourism Potential* made the initial assessment of the provincial wildlife viewing resource and its potential. This study, the first of its kind in Canada, suggested the means to manage and develop the resource in an environmentally and economically sustainable fashion. Issues dealt with in this study included:

- Management of environmental impacts.
- Competing land resource users.
- Land Base Administration.
- The integration of viewing and consumptive uses of wildlife.
- Operator licensing, tenure and fees.
- Financing of wildlife viewing tourism.
- Education and interpretation.
- Training and safety.
- Roles of the public and private sectors.

Many of this study's recommendations have been acted on. In particular, the Wildlife Branch in association with the Parks and Tourism Ministries (as well as wildlife organizations) has initiated a Wildlife Viewing Program. This program has already generated a series of wildlife development plans and sites, as well as a marketing strategy geared to encouraging non-commercial wildlife usage by British Columbians.

In concert with this, and in order to ensure that the commercial potential of B.C.'s wildlife viewing resource can be best utilized, the Ministry of Tourism has seen the need to develop a tourism marketing strategy for this sector. This study was undertaken to help accomplish this.

STUDY OBJECTIVES AND ISSUES

The objectives of this study were:

i) To analyze existing data sources to determine the value, markets and potential of the B.C. wildlife viewing product.

ii) To collect data from operators on the interests and activities of viewing client groups.

iii) To identify the market characteristics of the various commercial recreation activities associated with wildlife viewing, e.g., market profiles, demand characteristics, geographical origin, growth trends, and options in the provincial, national and international marketplace.

iv) To develop strategies and initiatives to assist private sector operators with the marketing of their viewing product.

STUDY PROCESS

The study was undertaken in the following manner:

i) Related studies were reviewed to identify key issues, concerns, product status and trends., e.g., Visitor '87 and '89 surveys, guide-outfitter, fishing lodge and guest ranch sectors studies.

ii) Interviews were undertaken with provincial government agencies and branches of the Parks, Forests, Environment and Tourism Ministries, as well as the Federal Department of Fisheries and Oceans. Relevant tourism agencies and sector associations were contacted for input as well.

iii) Interviews were conducted primarily by telephone, but also by mail, with British Columbia wildlife viewing operators, guide-outfitters, resorts, wholesale inbound tour operators and retail travel agents.

iv) Based on the foregoing data, market segments and present marketing tactics were identified and an analysis of competition was based on published information.

v) A series of key strategic issues were identified and their implications discussed. This provided the basis for development of strategic objectives and priorities.

vi) These objectives provided the framework for developing a market strategy for wildlife viewing.

STUDY TEAM

The study team was made up of four adventure tourism consultants. Ric Careless is a natural resources planner who specializes in tourism resource planning. He played a lead role in the 1988 Wildlife Viewing Study and other adventure tourism sector studies. Ann Pollock of the Tourism Research Group is a tourism marketing and product development specialist who has pioneered much of the work done on adventure tourism in Canada. Sue Henderson is a tourism consultant with experience in tourism marketing and the travel trade. Bob Jamieson, recently retired after 15 years in the outfitting industry, is a consulting biologist and land use specialist.

2. THE WILDLIFE VIEWING RESOURCE

RESOURCE DESCRIPTION

A description of the British Columbia wildlife viewing resource was incorporated in the 1988 Wildlife Viewing Study. Given its concise yet comprehensive nature it has been reproduced below:

"British Columbia has the most diverse bird and mammal fauna found anywhere in Canada. Of the 409 bird species known to breed in Canada, 288 (70%) can be found in British Columbia all or part of the year. Manitoba ranks second with 263 species (64%), and Ontario is third with 262 species (64%). (These figures include birds that breed and winter in each province and birds that only breed in each province.)

Of the 163 mammal species known to breed in Canada, 117 (72%) can be found in British Columbia. Whale, Dolphins and Porpoises are excluded from these numbers because their mobility makes range estimates difficult; however Seals, Sea-lions and Walruses are included.

Although comparison data for amphibian, reptile and fish species are not available for all of Canada, Orchard (1984) reports that 19 amphibian species and 11 reptile species are known to reside in British Columbia. Of the numerous fresh and saltwater fish species present in British Columbia, only the Salmon, Steelhead, and other salmonid species provide viewing opportunities, but these are probably the most spectacular in Canada (Johnston, 1986).

Besides having the greatest diversity of wildlife species in Canada, British Columbia also has the greatest number of bird and mammal species living exclusively in one province or territory (Maurer, 1985). Sixty-five of Canada's 409 breeding bird species are found in only one Canadian province or territory. Of these 65 species, 35 (54%) occur only in British Columbia. The Northwest Territories is second with 15 species (23%) and Ontario is third with 14 species (21.5%).

Of the 163 mammal species, 37 are found in only one province or territory. Of these, 28 (76%) are found only in British Columbia. Ontario is second with 6 species (16%), while Saskatchewan, Manitoba and the Northwest Territories are tied for third with 1 species (3%) each.

The diversity and uniqueness of our wildlife resources is greatly influenced by the diversity of landforms and climates. British Columbia contains the full range of habitats, including marine, estuary, wetland, freshwater, grassland, alpine, desert and numerous forest types.

Diversity comparisons can also be made with other jurisdictions in North America. Species diversity in British Columbia is greater than that found in Alaska. For example, Alaska has 281 regularly occurring bird species (Quinlan et al.,1893), British Columbia has 310. (These figures include birds that breed and winter, birds that breed only, and birds that winter only.) Alaska is home to 77 regularly occurring mammal species (Quinlan et al., 1983); British Columbia has 117. Alaska has 5 amphibian species and 10 reptile species (Taylor, 1979); British Columbia has 19 amphibian and 11 reptile species (Orchard, 1984).

From the perspective of wildlife viewing tourism, wildlife diversity on a year-round basis is important. And, since many species migrate or hibernate, it is important to examine diversity during non-breeding seasons.

The data show that during these seasons, 176 bird species can be found in British Columbia. Ontario is a distant second with 113 species, and Nova Scotia is third with 94 species. (These figures include the birds that breed and winter and the birds that winter only.)

Many of Canada's mammal species hibernate and are therefore unavailable for viewing during winter. However, almost the full range of Canada's hooved mammals are found in British Columbia, and most are visible even during the winter months due to British Columbia's mild climate. At this time they can be observed low in the valleys and along the major travel routes.

In addition to British Columbia's diverse and unique wildlife, many species are present in exceptional abundance. On a world wide scale, British Columbia has 60% of the Barrow's Goldeneye, 50% of the Trumpeter Swans, 50% of the Blue Grouse, 25% of the Bald Eagles, and 20% of the Harlequin Ducks (*Wildlife Viewing in British Columbia, 1988*)). With respect to mammal species, British Columbia has 100% of the Vancouver Island Marmots, 75% of the Stone Sheep, 60% of the Mountain Goats and 25% of the Grizzly Bears (British Columbia, 1988). Most importantly, for the purposes of this study, all of the above species can be easily viewed in British Columbia." (*Wildlife Viewing in British Columbia, 1988*)

WILDLIFE VIEWING ZONES

A mapping system for the B.C. tourism resource, based on geographical zones, has recently been developed (Careless,1987). Called the Tourism Zonation System, it forms the structure for the Ministry of Tourism's mapping of the province's tourism resource (Exhibit 1). Each of the four zones - urban, frontcountry, midcountry and backcountry - is defined by its accessibility,

WILDLIFE VIEWING
TOURISM ZONES
Frontcountry
Midcountry
Backcountry

environmental sensitivity, and its ability to attract and accommodate large numbers of visitors.

These geographical tourism zones have been incorporated into this study as wildlife viewing zones and are important to a number of topics, including the establishment of product types, the identification of market segments, product packaging, and resource and environmental management prescriptions. Each zone is described below.

i) Urban Zone
The urban wildlife viewing zone comprises urban centres in British Columbia such as Vancouver, Victoria, Prince George, Kamloops and Kelowna. Typically, urban-based wildlife viewing takes place around personal residences or in open areas within urban communities and as such, does not depend on the provincial land base. While some urban wildlife viewing opportunities are of local and non-commercial significance, they are of minor importance from a commercial standpoint.

ii) Frontcountry Zone
The frontcountry zone is characterized by excellent access, proximity to populated areas, and a general capability to attract and accommodate large numbers of tourists.

This zone comprises the settled regions of the province: specifically southern coastal and valley bottom areas, and the major highway corridors connecting these locations. Wildlife viewing in the frontcountry often takes place in naturally scenic, but human-altered environments. It is associated with motorized, high volume transportation: automobiles, tour buses, vans, and commercial aircraft.

Frontcountry sites tend to be used intensively, though per person expenditures are often lower than in the mid and backcountry. Nevertheless, the large volume of potential visitors generates sizable revenues thereby making higher investments in facilities possible, e.g., interpretive centres such as Creston. Given the linkage between wildlife viewing in this zone and the general tourism infrastructure (e.g. hotels, restaurants, airports), the indirect economic benefits from frontcountry wildlife viewing are substantial.

Proximity to urban populations allows frontcountry operations to enjoy a longer season, sometimes extending to a year-round operation. This is particularly so in those locations where big game species and waterfowl winter in the valley bottoms and southern coastal frontcountry zones.

As well, the frontcountry is used by waterfowl for migration stops and nesting, by fish for spawning, and by the birds that prey on the spawned-out fish. In general, ecological productivity of the more climatically favourable

frontcountry sites is higher than other zones, providing more intense wildlife use and more reliable viewing opportunities.

iii) Midcountry Zone
Wildlife viewing in the midcountry zone generally takes place in a natural wildland environment.

This zone comprises the B.C. hinterland, especially in southern and central regions, where forest and mining resource development has created access. Typically the quality of such access is poorer than in the frontcountry: e.g. gravel roads - even four wheel drive tracks - instead of paved highways. Motorized transport is still a feature of this zone, but it is generally lower volume and more expensive than the frontcountry, as in those instances where bushplanes and helicopters are used.

Given the greater distance and poorer access, wildlife viewing in the midcountry requires more expenditure of time and money than in the frontcountry. As a result, fewer people use this zone. Developed facilities tend to be smaller and less luxurious than in the front country (e.g. lodges and cabins instead of hotels). Economics often require that these facilities be multi-purpose: for example, a guide outfitter's camp may be used as a base for hunting in the spring or fall, and for wildlife viewing in the summer.

Given its relative remoteness and more difficult access, the midcountry offers the best Grizzly Bear viewing opportunity, for example, Meziadin Lake and Atnarko River. It also offers good montane wildlife and sea mammal viewing opportunities. Waterfowl viewing is poorer than in the frontcountry, since wetlands in this zone are often located at less productive higher elevations and northerly latitudes. For the same reasons, the midcountry does not offer the same extent or quality of winter wildlife as the frontcountry. As a result, the viewing season in the midcountry zone is considerably shorter.

In general, while midcountry wildlife viewing opportunities will often be good, they will be of lesser significance than the frontcountry zone where a more favourable climate enables prolonged and more reliable viewing; or in the backcountry zone, where species thrive in wilderness habitats away from the impacts of resource extraction and development.

iv) Backcountry Zone
The backcountry zone comprises those areas that have not been substantially altered by human activity. In southern British Columbia, the backcountry is confined to the larger park and wilderness reserves, as well as the least accessible portions of the Coast Mountains. In the north, this zone is more extensive, though as elsewhere it is rapidly shrinking as resource extraction activities advance. Absence of motorized vehicles and minimal infrastructure

are features of this zone. Wildlife viewing here is pursued using simple means (foot, horse, canoe or sea-kayak), although air transport is often required to access the zone. Travel in this zone generally requires the assistance of a guide or guide outfitter. Accommodation is limited to rustic cabins or tent camps.

The opportunity to view wildlife in such wilderness settings is becoming increasingly limited since most regions of the world have lost their wilderness. As a result, though the number of people engaging in backcountry wildlife viewing is small, potential customers are often prepared to pay high daily rates for the experience.

Wildlife viewing in the backcountry focuses on montane wildlife populations, which are often present in concentrations and diversities not found in front and midcountry zones. Healthy predator populations are a feature of the backcountry zone. As well, quality sea mammal sites occur in certain northern coastal areas. Bird populations are generally less significant in the backcountry since the remaining wilderness areas are located at less productive high altitudes and/or northerly locations.

Given this geographic distribution, the backcountry viewing season is shortest of all zones and usually occurs from late spring to early fall. In winter, many of the species migrate to the lower, warmer climates of the mid and especially frontcountry zones.

SITE INVENTORY

A major part of the 1988 B.C. Wildlife Viewing Study involved the inventory of sites with the capability to support this activity. (Prior to that report no such resource assessment existed other than *Wildlife Viewing in Southwestern B.C.*, Maurer, 1985.) Using information gathered from wildlife specialists as well as informed members of the public, a preliminary list of 300 sites were identified province-wide. From this list, 51 "Choice Wildlife Viewing Sites" were derived. It was considered that these would form the focus of future commercial and non-commercial wildlife viewing programs. The factors used to identify the Choice Sites included:

- species diversity
- species uniqueness
- population size
- viewing reliability
- length of season
- environmental site sensitivity
- site tenure
- secondary features, e.g. , geology, recreation opportunities
- educational/interpretive opportunities

This inventory process has provided the basis for the site planning now being undertaken by the Wildlife Branch. It also provides site-specific resource information upon which to develop wildlife viewing products and marketing campaigns.

ENVIRONMENTAL CONSIDERATIONS

Wildlife viewing is often referred to in the literature as a nonconsumptive use of wildlife. To the extent that participation in the viewing activity is not intended to result in the death of the animals, it is non-consumptive. However, viewing still affects the wildlife resource. Without careful management, impacts can be severe and to the long term detriment of animal populations. The nature of these potential impacts is given below.

i) Overuse

The resilience of wild animals to human viewing varies with species and frequencies of visits. Some animals such as Caribou may be scared away from traditional habitat for long periods if they are approached. (By contrast, other species such as Mule Deer, are much more tolerant of human contact.) For some species, an occasional viewing - even by a sizable viewing group - may be tolerable, while repeated visits may not. Overuse may also result in physical degradation to the site. Alpine areas for example are sensitive to horse and foot traffic and most certainly to any off-road vehicle traffic.

ii) Viewing During Sensitive Season

Some animals are more vulnerable to viewing pressures at certain times of the year. With birds for example , close viewing during nesting can cause nest abandonment and mortality to the young. Similarly, wintering ungulates can be especially vulnerable to approach by people. The energy the animal expends from the stress of being approached or from running away can be life threatening, particularly if the animal is approached repeatedly over a hard winter.

iii) Choice of Access

Animals feel more threatened being approached on foot or by aircraft than by being viewed from a car. On the other hand, construction of roads for wildlife viewing can degrade wildlife habitat and lead to animal kills through collisions with vehicles.

iv) Development of Facilities

The development of facilities related to wildlife viewing may destroy important habitat and wilderness values. The development of facilities can also promote overuse of sensitive sites by attracting much higher levels of visitation than would otherwise occur.

v) Animal Harassment

An animal can become stressed if it is approached too closely or too frequently. While there are instances of deliberate harassment, usually it occurs unintentionally either due to visitors being unaware of an animal's sensitivity or from their desire to get just a little bit better photograph. Apart from the stress to the animal, harassment also increases the risk that the animal will attack.

vi) Increased Poaching

The relationship between poaching and wildlife viewing is unclear. The identification of key wildlife viewing opportunities can result in sites being used for poaching. (Examples have been recorded in the Chilcotin, where shotgun shells have been found on viewing platforms.) On the other hand increased tourist activity at viewing sites can decrease poaching.

To date, environmental impacts from wildlife viewing itself have generally been minimal. This is due to the fact that wildlife viewing is currently a small part of the tourism industry and existing operators are involved in the business partly for the lifestyle, the love of the outdoors and wildlife, and the opportunity to offer their clients a quality, natural experience.

However, this situation could change radically as wildlife viewing becomes a more important part of the tourism industry. The potential for expansion can be expected to present operators with some difficult choices. In many cases, capitalizing on prime business opportunities will depend on upgrading accommodation (lodge, restaurant, flush toilets,etc.), which in wilderness areas will cause impacts. Even if clients accept appropriately developed facilities and request relatively low-impact access modes of travel, - such as pack horses - irreparable environmental damage can still occur if economies of scale dictate group sizes beyond the tolerance of the habitat or animal populations.

Frontcountry sites are generally accessible by good-quality roads. Since many locations are situated beside highways, animals often adapt to contact with people. Still, development of sites in this zone will greatly intensify the level of animal-human encounter and will increase the number of people approaching wildlife on foot. While generally more resistant than mid and backcountry zones, some frontcountry sites will be sensitive, perhaps even too sensitive to permit tourist viewing activity.

Midcountry sites are likely the easiest to manage for environmental integrity. These sites will generally not experience the high traffic of the frontcountry site, nor are they as environmentally sensitive as the backcountry.
The backcountry zone is generally the most environmentally sensitive and the high quality experience that draws visitors from around the world can be lost if use is excessive or inappropriate.

ROLE OF GOVERNMENT

i) Ministry of Environment

The Wildlife Branch is charged with managing wildlife for consumptive and non-consumptive uses as well as protecting the diversity of the wildlife viewing resource. The Branch also has a mandate to maintain habitats and wildlife populations for their intrinsic value to society. While the Branch's traditional client base has been hunters and guide outfitters, a new client base is emerging - naturalists, birders and commercial wildlife viewing enterprises. In order to meet the requirements of this new group, the Branch is implementing "B.C. Wildlife Watch" a program that is aimed at raising the awareness of B.C. residents and visitors to the opportunities available for seeing wildlife in B.C. This program focuses on non-commercial viewing. (Note: Non-commercial refers to a viewer who does not purchase the services of a guide or tour service; it does not exclude viewers that purchase accommodation, travel and other related services.)

The five year objectives of the Viewing Program, under broad-based direction of an advisory committee, include:

- development and maintenance of 51 high quality viewing sites;
- identification and promotion of wildlife viewing opportunities that diversify the industry;
- increasing the wildlife viewing component of the adventure tourism market by 20% per year;
- increasing public awareness of wildlife and wildlife habitat through a communication strategy that includes identification of target groups, creation of a program logo, educational and promotional materials and advertising; and
- evaluation of site and industry development, resident and non-resident participation, and public awareness.

Traditionally the Branch has administered the licensing of guide-outfitters for commercial guiding of non-resident hunters. It is conceivable that a new Branch responsibility could involve extending a similar administration system to wildlife viewing guiding.

ii) Ministry of Tourism

As a tourism activity, wildlife viewing offers employment and revenue opportunities to the province. The Tourism Ministry is responsible for enhancing these by providing product development, research, marketing and resource management services to the tourism industry. This study typifies the type of initiative the Ministry undertakes.

iii) Ministry of Crown Lands

The Ministry of Crown Lands is the lead agency responsible for licensing commercial recreational use of Crown Lands. To date this Ministry has been involved in the licensing of heli-skiing and it is likely that this responsibility will be extended to other activities. Crown Lands is responsible for the tenuring of sites for cabins and other facilities and it will likely continue in this role. Clarification of the Ministry's role with respect to wildlife viewing questions will become apparent with the completion of the multi-agency policy review of backcountry recreation. This review is being headed by Crown Lands.

v) Ministry of Forests

The Ministry of Forests is responsible for managing most of the Crown forest landbase on which wildlife viewing is likely to occur. The Ministry has recently established a Integrated Management Branch to enable this, though most of the responsibility for wildlife viewing policy development lies with the Wildlife Branch of the Ministry of Environment.

The Forest Service Wilderness Area policy could have a major impact on commercial wildlife viewing options. The degree to which commercial operations are allowed in wilderness areas will affect the options for viewing businesses, especially as the Ministry's wilderness system is expanded throughout the province. There is a sense in this Ministry that wilderness areas should perhaps allow more commercial use than provincial parks (which by contrast place priority on resource protection and local non-commercial recreational use). Distinct policy on this topic has yet to be developed.

v) Ministry of Parks

The Ministry of Parks is responsible for administering the landbase and resources encompassed within the provincial parks system. This mandate includes the protection of the wildlife resource found in parks, and the interpretation of this to the public. As such, the Ministry of Parks plays a key role in the B.C. Wildlife Watch program. These include many of the key locations on which wildlife viewing occurs. In provincial parks, resource protection and local independent recreators are generally given priority over commercial tours and other such uses. A recent public survey administered by Parks reinforces this perspective with 86% of respondents stating that "preservation of the natural park environment" is very important as compared to only 53% who believe parks should be used for tourism (Parks, 1990)

3. PRODUCTS AND EXISTING INDUSTRY

While a wide range of potential wildlife viewing opportunities are available in British Columbia, a tourism marketing strategy needs to be based on those products with greatest potential.. Identifying this requires consideration of three variables: (1) viewers preference for species; (2) the distribution of species across wildlife viewing zones; and (3) the seasonality of tourism and wildlife viewing opportunities. As well, the nature of wildlife viewing product sought will be partially determined by whether it is offered as the primary tourist experience, or as a secondary enhancement to another adventure tourism activity.

PREFERRED SPECIES

The 1988 Wildlife Viewing study undertook interviews with wildlife management professionals, park managers, members of wildlife-oriented public groups and wildlife viewing operators to determine which species would have the greatest ability to attract viewers. The following list of preferred species and groups of species was compiled. (The sequence does not imply relative significance or preference.)

- Bears, especially Grizzly.
- Raptors, especially Bald Eagles and Peregrine Falcons.
- Predators, especially Cougars and Wolves.
- Waterfowl and shorebirds.
- Songbirds.
- Sea mammals, especially Gray Whales, Sea Lions, and Killer Whales, and other sea life, including sea birds.
- Montane wildlife, featuring Mountain Goats, Mountain Sheep (3 species), Elk, Caribou (2 species), Moose and Deer.
- Small mammals.
- Fish, especially spawning salmonids.

GEOGRAPHIC DISTRIBUTION

Each of the three wildlife viewing zones - front, mid and backcountry - are characterized by varying degrees of wildness and accessibility. Combining these with the nine preferred species groups delineates twenty-seven (3 times 9) wildlife viewing product.

SEASONS

Wildlife viewing opportunities exist during most seasons, although the location and nature of these will vary from site to site. Traditionally, B.C.'s tourism has been heavily weighted towards the summer months as the following figures show:

Table 1
Seasonal Distribution of Non-Resident Tourism

Spring (April - June)	25% of all respondents
Summer (July & August)	31% of all respondents
Fall (September - November)	24% of all respondents
Winter (December - March)	19% of all respondents

Source: Visitor '89, Ministry of Tourism

While summer has been the traditional "tourist" season in British Columbia, with many facilities being fully booked, occupancy rates decline sharply in the fall, winter and spring seasons. Therefore, it is often desirable to attract tourists during the non-summer seasons to improve the profitability of tourism enterprises.

One strength of wildlife viewing is that opportunities for wildlife viewing exist throughout all seasons, and this can enhance tourism in the shoulder and low periods of the year. During the summer months, significant frontcountry sites (e.g., Creston Wildlife Sanctuary) can attract visitors to areas they might not otherwise visit, thereby resulting in an extra half or whole day being spent in a region or within the province. In the midcountry and backcountry zones, wildlife viewing opportunities will attract new destination-oriented visitors. This will be especially important to rural and northern areas which are sometimes not prime summertime destinations.

During the spring and fall, wildlife viewing products associated with the frontcountry and midcountry zones (e.g., waterfowl migrations in the Columbia, Fraser and Creston Valleys) will attract new visitors and lengthen the tourist season. Due to the cooler and wetter climate, these visitors will be less inclined to camp out, and be more likely to use tourist accommodations. In the fall, it will be necessary for wildlife managers to institute measures that will reduce the potential for conflict between hunters and viewers.

In the winter, good opportunities occur for viewing wildlife in locations such as the East Kootenay region. Ungulates can be easily and reliably viewed, without disturbance to the animals. Similarly, waterfowl and other bird viewing is possible in the Fraser Valley and southern part of Vancouver Island. In the north, herds of Moose, Deer and Caribou are visable in their winter ranges, but access is difficult, the days short, the temperatures low, and the animals can be easily over-stressed.

But while such opportunities exist for winter viewing, adverse weather conditions deter significant participation. This is even true on the relatively mild southern coast. While wildlife viewing may be associated with other winter attractions, it is unlikely to generate major tourism activity. This is because the majority of travellers tend to focus on warmer climates at this time of year.

PRIMARY AND SECONDARY PRODUCT

Wildlife viewing product can be subdivided into two components depending on the travel objective of the participant. Primary product relates to those adventure tourism offerings which focus on wildlife viewing as the main activity, e.g., whale watching tours. Secondary product refers to situations where viewing of wildlife is supportive of, or incidental to, the prime tourism activity, e.g., watching Bald Eagles during a fishing trip. In the case of secondary product, there is no doubt that the wildlife viewing experience contributes to the main offering, but it serves as a bonus rather than the premier attraction.

Primary product is the focal activity and often the sole offering of a wildlife viewing operation. This is reflected by the images and text used in the product's marketing. Primary wildlife viewing products include:

Bird watching
Whale-watching
Wildlife Photography & Sketching
Wildlife/Marine Biology/Ecological Studies

As a secondary product, wildlife viewing provides a significant part of experience in a wide variety of other adventure tourism products, such as:

Hiking
Canoeing
Rafting
Horseback Trips
Camping
Fishing
Scenic driving
Wilderness lodges
Sailing charters
Mountain biking
Kayaking
Sailing
Cross-country Skiing
Scuba Diving
Hunting
Guest Ranching
Cruise ships
Anthropological tours

EXISTING INDUSTRY

Wildlife viewing opportunities are provided in a variety of ways to appeal to different user groups. A relatively small group of operators presently market wildlife viewing as the primary activity. For example, in 1987, 17 operators offered wildlife viewing as a primary product for a direct revenue value of $2.5 million. They provided 31,500 user days of service at an average per diem rate of $80.00. (*Wildlife Viewing in B.C.*, 1988) These 17 operators included 8 marine tour operators, 6 land tour operators, and 3 tour package operators.

The major concentration of these primary product operations related to whale-watching on the Lower Mainland and Vancouver Island coasts. As well, some birding and natural history trips were provided throughout the province and at least one operator offered ungulate viewing on winter ranges in the interior.

Table 2
Structure and Value of Primary Industry in 1987

Industry Sub-segment	Operators	User-days	Per Diem	Total revenue
Marine				
Front - small	5	11,500	$ 50	$575,000
Front - large	1	8,000	$45	$360,000
Back - small	2	4,000	$200	$800,000
Land				
60% Back - natural history 10% Mid - natural history 30% Front - guide/outfitter	3	6,000	$90	$540,000
60% Back - guide/outfitter 40% Mid - guide/outfitter	3	1,000	$150	$150,000
Tour				
Front	3	1,000	$ 75	$75,000
Totals	**17**	**31,500**	**$79**	**$2,500,000**

Source: Wildlife Viewing in B.C.; 1988.

Table 3
Distribution of Primary Industry by Wildlife Zone

Zone	# of User-days	Zone % of Total User-days	Total Zone Revenues	Average Zone Revenue per User-day
Front	22,300	71%	$1,172,000	$52.56/day
Mid	1,000	3%	$ 114,000	$114.00/day
Back	8,200	26%	$1,214,000	$148.00/day
Totals	31,500	100%	$2,500,000	$ 79.37/day

Source: derived from Table 2 .

What this analysis reveals is that almost three-quarters of primary viewing activity is undertaken in the frontcountry - the zone which is the most

resilient to heavy use. The backcountry handles about one quarter of primary viewing, but because of the higher per diem rates that can be charged (due to the uniqueness of the product), it generates slightly more revenue than the frontcountry. Usage of the midcountry is light, indicating that opportunities have yet to be developed.

Beyond the primary product, in 1987 there were 163 adventure operators that offered viewing as a secondary product (e.g., observing Grizzly Bears on a rafting expedition, ORC, 1987). Note: The ORC study identified 180 operators supplying wildlife viewing product. Given that there were 17 operators offering primary product, this leaves 163 supplying wildlife viewing in a secondary form. The annual revenues ascribed to this secondary product, i.e., only the wildlife viewing aspect, was $16.5 million (*Wildlife Viewing in B.C., 1988).*

The contribution made by secondary viewing to other adventure tourism activities can be estimated by calculating the proportion that its revenue makes up of total adventure tourism revenues. In 1987, overall adventure tourism revenues in British Columbia were $123.5. (The DPA Group Inc.,1988). Note: This figure excludes revenues for commercial sports fishing, primary wildlife viewing operators and heli-skiing - where minimal secondary wildlife viewing occurs. With revenues of $16.5 million, secondary wildlife viewing product contributed 13% to the overall adventure tourism industry.

As a further insight into secondary product, the report entitled: *Opportunity Analysis of Guides and Outfitters of B.C.* (The DPA Group Inc., 1989), noted that 23,300 non-hunting client days were provided by guide outfitters in 1988. Some 5,150 clients paid 2.5 million dollars for this service. While this component of the guide-outfitter business focuses on fishing guiding and backcountry horse trips, in both cases wildlife viewing is an important part of the experience.

STRENGTHS, WEAKNESSES AND OPPORTUNITIES

The experience of countries such as Kenya, Tanzania and Costa Rica, shows that wildlife viewing as a primary product can be a major attractor of international travellers. But while the assessment of B.C.'s wildlife viewing resource shows that this province has the attributes to compete in the international marketplace, to date, B.C.'s primary product offering has been small. Instead, wildlife viewing in the province has predominantly been offered as an a secondary adjunct to other activities.

The experience elsewhere shows that substantial growth in primary product - as well as secondary - is possible. To determine how this might be done, an

assessment of the strengths and weaknesses of the industry must first be considered. This is done in the following section based on comments derived from discussions with operators (see Appendix A for the list of operator's interviewed).

Strengths

- abundance of species, many of which have strong market appeal;
- wide range of habitats;
- quality natural environment with scenic landscapes;
- strong international image of wilderness opportunities;
- relatively mild climate and long viewing season;
- reasonable access costs into all parts of the province except the far north;
- an initiative between the Ministries of Environment and Tourism to co-operatively develop the wildlife viewing resource;
- a desire by all adventure commercial operators to increase the wildlife viewing product in their marketing material;
- rising public interest in wildlife viewing as societal environmental concern increases;
- B.C. has an established image of providing quality tourism experiences;
- a well-recognized Ministry of Tourism marketing program geared to "Super Natural B.C.". This tagline is very complementary to potential promotions for wildlife viewing; and
- well developed parks and wilderness areas.

Weaknesses

- few developed viewing sites;
- lack of information on viewing opportunities;
- limited availability of commercial wildlife viewing packages;
- lack of an integrated marketing strategy;
- limited budget and manpower for managing the wildlife resource;
- B.C. lacks an "exotic" international product image for most North American markets due to its proximity to the U.S.;
- lack of understanding of wildlife viewing product requirements amongst operators who could provide secondary product, e.g. outfitting and rafting companies;
- lack of familiarity with modern marketing techniques among the present and prospective operators;
- the vulnerability of the wildlife viewing resource to overuse or abuse;
- lack of knowledge of travel wholesaler process among operators;
- lack of sales support from the travel agency sector;
- potential for conflict between hunting and wildlife viewing;

- no means for licensing commercial wildlife viewing operations;
- lack of training for operators expanding into this sector, e.g., in natural history, minimum impact wildlife viewing techniques;
- little capital financing available for the small scale operators that typify the wildlife viewing sector;
- many operators in related adventure travel sectors (e.g., rafting and outfitting) are in the business for life style reasons and may not be interested in expanding into wildlife viewing;
- a lack of secure landbase due to only a limited number of parks and wilderness areas. Without a secure land base, banks are reluctant to provide financing;
- high profile land use conflicts such as South Moresby undermine the credibility and attractiveness of B.C. as a wildlife viewing destination amongst U.S. environmentalist markets; and
- lack of information on the potential impacts of wildlife viewing on major species such as Orcas and large ungulates, and the means of minimizing such.

4. COMPETITION ANALYSIS

THE INTERNATIONAL SIGNIFICANCE OF BRITISH COLUMBIA'S WILDLIFE VIEWING RESOURCE

Traditionally British Columbia has *not* been perceived internationally as a prime exotic wildlife viewing destination. This is primarily due to the lack of awareness by British Columbians themselves as to the global significance of the wildlife found here. Such a 'take it for granted' approach has meant that the Province has not promoted wildlife viewing as a product, and has, therefore, not captured the economic benefits to be attained by so doing. Tourism B.C.'s marketing has focussed on Vancouver as a sophisticated urban centre with exceptional access to spectacular scenery and wilderness experiences. As a result, wildlife viewing in B.C. has been profiled as a secondary benefit to other products.

By contrast, several other locations in the world - particularly African countries - market wildlife viewing as the centrepiece of their tourism industry. This has resulted in major benefits for their economies. Analysis of the B.C. wildlife viewing resource shows that the province has what it needs to emulate these nations. From an international perspective, a Grizzly Bear is as exotic as a Rhino, and a Mule Deer as interesting as a White-eared Kob or Musk Deer.

To help position B.C. in an international context, Table 6, compares the province's wildlife viewing resource with each of the neighboring provinces and states that provide a similar viewing product, as well as the major overseas competitors. Scoring for this analysis is based upon the criteria of: species diversity, spectacular species availability and scenic values, for British Columbia. The method used to develop and assign scores was designed by BioQuest International, and can be found in Appendix B.

In this analysis B.C. scores 159 points, in excess of the values for any other nearby jurisdiction. Alaska, the nearest competition, scored 149 points. And while the leading African wildlife viewing nations - Kenya and Tanzania - have substantially higher scores, B.C. is equal to South Africa and ahead of Ghana (the latter whose wildlife values can be considered closer to the average African wildlife viewing resource).

What this means is that B.C. has the quality of resources to become a key global wildlife viewing destination. Additionally, B.C. has other advantages over its prime African competitors, especially where infrastructure development and political stability is concerned. Political problems in South Africa and more recently in Kenya have seriously affected their competitive position. For example, tourists to Kenya have been killed in recent years by

rebels and/or bandits These tragedies have resulted in a major decline in tourism revenues in that country (B. Foster, pers. com). Tanzania, on the other hand, is stable politically, but only recently has it been able to develop the necessary infrastructure - hotels, roads, etc. - to take advantage of its substantial parks and wildlife resources.

Such problems may give British Columbia, with its stable political climate and effective infrastructure, a competitive edge. On the downside, the ongoing heated controversies that typify land use issues in B.C.(e.g., South Moresby), are a disincentive to operators and also affect our international image.

Other international wildlife viewing areas of distinction include Costa Rica. Here the attraction is not large mammals, but rather over 800 species of birds and 1600 kinds of orchids. Farther south in the Amazon, the draw is the diversity of birds, animals and plants to be found in the tropical rain forest. In Nepal's Royal Chitwan National Park wildlife viewing is of key significance; here, Tigers and Rhino can be observed from the back of an Elephant. As with the African nations, in most of these cases the advantage in terms of spectacular displays of wildlife, offset by a lack of infrastructure or political stability. Therefore, in the final analysis, British Columbia should be able to compete very effectively in the international market.

In order to get a more detailed knowledge of British Columbia's place in the international wildlife viewing tourism arena, descriptions of its prime competitors are provided below.

AFRICA

For a number of African nations, wildlife viewing is the keystone of their the tourism industry. Kenya established itself as a leader in providing wildlife viewing opportunities for tourists, largely through a close relationship between the national parks and the private sector. Especially in the last decade (until the recent killings), visitation here has skyrocketed and the range of opportunities for viewing wildlife has been broadened to include luxury hotels, resorts on stilts above the plains, bus tours, and guided hiking tours. Where Kenya has led, several African nations have followed, including Tanzania, Botswana, and others (Eltringham, 1984).

In Kenya, viewing has developed on a front/mid country mode with vehicle tours based out of major cities that take visitors to major national parks, utilizing near-by high quality accommodation. In Botswana viewing is more oriented to backcountry-style viewing. The Okavongo swamp and the Kalahari desert - the major wildlife areas in that country - have long been used by "white hunters" who operate in a manner similar to outfitters in this country. Safari South, a major hunting company, now offers wildlife viewing out of some of their camps, which are semi-permanent tent camps or

relatively rustic accommodation in wild country. Air access is required into most of these camps.

Table 4
Comparisons of Wildlife Viewing Values in Various Jurisdictions

Jurisdiction	Large Mammal	Small Mammal	Other Attrac	Distinctive Ecosystems	Total
North America					
B.C.	42	45	40	32	159
Alaska	35	36	40	30	141
Yukon	26	34	13	24	97
N.W.T.	24	31	10	24	89
Alberta	33	43	9	22	107
Montana	29	43	9	23	104
Idaho	22	40	8	22	92
Washington	19	35	26	21	101
Oregon	14	32	23	21	90
California	10	27	30	20	87
Colorado	21	29	8	15	73
Texas	10	19	12	13	54
Maine	6	30	12	9	57
Quebec	15	30	23	13	81
International					
China	21	23	14	24	82
Germany	4	21	9	8	42
Kenya	64	46	41	22	173
Tanzania	70	50	40	26	186
Ghana	21	44	35	12	112
South Africa	57	55	30	15	157

Source: BioQuest International, 1990

Generally tourism revenues help governments and park administrations justify management expenditures, especially with regard to controlling poaching and agricultural encroachment. Also, the presence of conservation-oriented visitors, particularly in the more remote backcountry areas, tends to help discourage poachers. Today, an estimated 5,000 outfitters, guide services, and specialty travel agents offer adventure travel packages to a wide array of frontcountry and backcountry areas in Africa. Many of these tours are focused on opportunities to view wildlife.

The typical pricing for such tours, normally stated as a land cost only (i.e., not including transportation to the start of the tour), ranges from about $ 1500 (US) to $ 3500 (US), with costs per day ranging from about $ 110 to $ 160 (US). This is a good indication of the willingness of the marketplace to pay for such wildlife viewing experiences.

Despite such a promising picture, there are also examples in Africa of countries where the promotion of wildlife viewing has failed, either through poor management of wildlife stocks (Zambia), poor development of a national park or protected area system (Nigeria), a lack of infrastructure (Zaire, Mosambique) or simply a lack of appropriate wildlife and scenic resources (Ghana). In several countries options have simply been negated by the impact of other land uses, primarily agriculture (Ethiopia), and poor land management. The lessons to be learned by B.C. from these situations is important. For although its North American situation differs from that of the African Third World, land use strategies will decide whether B.C. will be successful in realizing the world scale potential of its wildlife viewing resource.

ALASKA

If any region of North America captures the imagination, it is Alaska. Americans consider Alaska their last remaining frontier, and many have a strong desire to visit it. Alaska's tremendous reserves of dedicated wilderness (38% of the State's area is within parks and related reserves) as well as wildlife protection areas have been well publicized. Interest in seeing wildlife is high; 30 to 40% of inquiries to the Alaska Tourism Division relate to wildlife.

The analysis in Table 4 suggests that in North America, only Alaska can come close to offering the diversity of habitats and species that is found in B.C.. As well, Alaska has a developed system of hunting and fishing lodges that caters to viewing clients and provide the kind of quality accommodation and service that such clients typically expect (e.g., McNeill Falls). Such facilities are less commonly found in B.C.

Alaska has published an excellent, full-colour guide to viewing wildlife in the State. The tourism industry seriously promotes wildlife viewing as a focus for visits to the State. For example, one company advertises trips to Katmai and Denali Parks for "close-up encounters with Caribou, Fox, Dall Sheep, Moose, and Bear" (Vickerman, 1988). The private sector appears to be taking the lead role in promoting wildlife viewing, while the State is concerned primarily with protecting the resource.

OREGON

Wildlife viewing and associated tourism is emerging in Oregon. A variety of state and federal lands offer opportunities to view fish, birds, small mammals, Deer and Elk. Most significant are the State sanctuaries and approximately one dozen national wildlife refuges, each of which is promoted by a brochure that encourages wildlife observation and identification. As well, a state-wide guide and highway signing encourages viewing use.

While wildlife diversity and abundance are considerably lower here than in British Columbia, Oregon is much closer to the California market. Therefore British Columbia must market effectively to ensure that visitors driving from California spend as much vacation time as possible in this province (i.e., half a day longer spent in Oregon may mean half a day less spent in British Columbia).

WASHINGTON

Some 20 national wildlife refuges play the greatest role in providing wildlife viewing opportunities in the State of Washington. Like Oregon, these refuges primarily offer opportunities to observe birds, small mammals, deer and occasionally Elk. Although these do not emphasize tourism, they attract the attention of Americans travelling by automobile; thus they offer British Columbia some competition. However, the proximity of this State to B.C. (which offers superior viewing opportunities) suggests it will be more of a potential market for viewing than a competitor.

WYOMING

Wyoming is one of the few States to actively pursue wildlife viewing tourism using the slogan:"Wyoming's Wildlife - Worth the Watching". The industry is already well-established on the prime resources of Yellowstone and Grand Teton National Parks. Yellowstone in particular is probably America's best known wildlife viewing area, with year-round tourists. Yellowstone's geothermal landscapes makes for exceptional winter viewing of wildlife . In addition to these National Park sites, the State is proceeding with the designation of viewing sites, developing interpretive displays, and publishing promotional materials.

In 1986, the Department of Game and Fish prepared "A Plan for the Development of Nonconsumptive Use of Wildlife in Wyoming". This plan estimated that such recreation had a present annual economic worth of $678 million (US) and proposed the goal of increasing nonconsumptive wildlife expenditures to over $ 1 billion (US) by 1991 (Wyoming, State of, 1986). Much of the plan's thrust is directed towards encouraging highway travellers to stay longer in the State.

Recognizing the strong growth potential for wildlife viewing in resident and nonresident markets, the Game and Fish Department has endorsed the spending of $3.5 million on non-game projects, using revenues predominantly from hunting and fishing licences (Vickerman, 1988).

ALBERTA

The wildlife resources of Alberta that receive the greatest tourist attention are those of the National Parks. Like Wyoming's Yellowstone, these are internationally famous sites. Elsewhere agriculture dominates much of Southern Alberta, thereby considerably limiting wildlife habitat. In the north, the extensive conifer forests are of lower wildlife productivity and are so densely timbered as to make viewing difficult. One important exception is the Bison herd contained in a large paddock at Elk Island National Park, east of Edmonton.

In the mountain areas, while Parks Canada recognizes that the opportunity to view wildlife motivates visits to the National Parks, the agency has collected little data on this use (Beland, 1988). In Jasper and Banff National Parks, many of the sightings of Deer, Moose, Bear, Goat, Sheep, and Elk occur in close proximity to the main highways, and other high use areas, such as campgrounds. No attempts have been made to facilitate this viewing opportunity. The viewing facilities in these parks are often self-guided trails and viewing sites oriented to nature observation in general. Each of these may represent capital investments of $35,000 to $100,000, and operating costs are minimal.

Traditionally, wildlife viewing in these parks has been supplied by Government. Efforts to privatize these services in the mid-80's met with strong public opposition and was discontinued. As a result, any would-be commercial wildlife viewing operator must today try to compete with the free government services. Beyond this, park policy now requires that commercial interpreters must meet the standards and be licensed by Canada Parks Service. This means that the private wildlife viewing industry is unlikely to grow substantially in the parks, despite the resources.

While these mountain parks do have a long-standing history as key wildlife viewing areas, the future looks less promising. A lack of fires or habitat management in the parks have lead to major declines in habitat quality for the large ungulates. Elk populations in the Bow valley are, for example, a fraction of what they were in the 1950's. The image of abundance has been maintained simply because the grass along the highly-visable margins of the major highways is now a major source of forage for the remaining Elk, Deer and Sheep herds.

With the exception of it's mountainous portion, Alberta does not possess the wildlife resources to be a significant competitor to British Columbia. Banff

and Jasper National Parks are well established as international destinations, but their proximity to British Columbia also gives nearby parts of this province access to the visitors they attract.

YUKON AND NORTHWEST TERRITORIES

Both of these northern jurisdictions recognize that visitors are interested in viewing wildlife. A 1982 survey found that "viewing wildlife" was one of the leading trip motivators (26.4%) and that not seeing wildlife was one of the major sources of trip dissatisfaction (Yukon Dept. of Tourism, 1984).

The Yukon Government has undertaken studies related to wildlife viewing (Crane Mgmt, 1988). The 1987 Yukon Visitor Exit Survey, however, indicated that dissatisfaction existed with wildlife viewing amongst Yukon visitors. This has been attributed to two primary causes: a lack of information regarding the activity in the Yukon, and a lack of developed viewing sites for highway travellers.

Yukon visitors simply did not see the wildlife they had been led by advertising to expect. This is due in part to a lack of facilities, but is also a result of the relatively lower productivity of wildlife ecosystems this far north. Although there are spectacular wildlife displays there, wildlife populations per square mile are comparatively low.

Access will continue to be a problem for the Yukon in all aspects of tourism including wildlife viewing. Since a large majority of Yukon visitors travel up the Alaska and Stewart-Cassiar Highways on their way to Alaska, there would seem to be options for providing viewing. The experience of one of the authors at Toad River on the Alaska Highway was that these visitors were very much oriented to the goal of reaching Alaska or the Yukon and were not interested in stopping enroute for wildlife viewing or other activities.

In both the Yukon and Northwest Territories, the private sector and community-based interests take lead roles in promoting wildlife viewing. A number of well-established lodges already cater exclusively to this market; and tours to view Polar Bears, Walruses, and other animals of the Arctic are increasingly available. Still, in both Territories, the climate and short summer will likely constrain private sector investments in frontcountry infrastructure. Backcountry tours, with opportunities to view various Arctic species, will continue to grow.

Compared with British Columbia, the Yukon and Northwest Territories are considerably less accessible and have shorter tourism seasons. They offer a range of wildlife viewing experiences (in terms of landscapes and species) not found in this province, so they may appeal to people with professional or strong amateur interests in wildlife.

5. THE EXISTING MARKET FOR WILDLIFE VIEWING

As identified in Chapter 2, the market for wildlife viewing can be categorized into two groups. First, those persons who watch wildlife while undertaking another recreational/leisure activity and for whom the act of seeing wildlife enhances their enjoyment. This group may be described as the market for incidental wildlife viewing. These people see wildlife as part of a trip they have arranged independently or as part of a package purchased from a supplier. The second group are those persons whose primary purpose is to view wildlife and who purchase a wildlife viewing experience from a primary operator.

In both cases, persons wishing to view wildlife will come from two major sources: non-resident visitors to the province and residents travelling within British Columbia. In order to compile figures regarding the potential size and characteristics of this market, statistics were obtained from Visitor '89, the B.C. Resident Travel Survey, a survey of primary operators undertaken as part of this project, and a market analysis of Adventure Travel undertaken by the Outdoor Recreation Council in 1988.

THE MARKET FOR INCIDENTAL WILDLIFE VIEWING

Non-resident tourists made a total of 7.63 million person-trips to British Columbia in 1989 and spent a total of $2.4 billion during their stay. A questionnaire on wildlife viewing activities was included in the *Visitor 89* survey periods of winter and spring of 1988/1989, and provides a limited profile of the non-resident market. In the winter (December - March), 5.2% of the respondents indicated that that they spent some time outdoors when the main purpose of the outing was to watch, feed, photograph or study wildlife. In the spring, 19.5% responded positively to the same question. In order to produce some order of magnitude for the total number of non-resident visitors who view wildlife, we have projected a 25% participation rate for the summer and a 10% participation rate for the fall. According to the Visitor '89 data, as many as 1.26 million non-resident visitors could potentially have participated in some form of wildlife viewing during their stay in British Columbia in 1989. Table 5 shows a breakdown of this non-resident participation by season.

Table 5

Non-resident Visitor Participation in Wildlife Viewing

	Winter	Spring	Summer	Fall
Visitor Parties	614,910	778,680	957,900	738,510
Participation in Wildlife Viewing	5.2%	19.5%	25%	10%
Participant Parties	31,975	151,842	239,475	73,851
Party-Size	2.46	2.55	2.65	2.13
Participants	78,659	387,197	634,609	157,302

Source: Visitor '89, Ministry of Tourism

Table 6 compares the demographic characteristics of those non-residents in the winter and spring who said they purposely spent time outdoors viewing wildlife, with the characteristics of all non-resident visitors. The greatest differences appear to occur in winter when the wildlife viewing respondents were dominated by residents from Washington. In the winter, wildlife viewers were more likely to have arrived in B.C. by car and to be aged 19-24. In winter they were more likely to be on a touring trip and in spring they were more likely to be on touring and outdoors trip than visitors as a whole. Generally speaking, non-residents who participated in wildlife viewing activities in the spring tended to share similar characteristics to the visitor population as a whole during that season.

Table 6
Demographic Characteristics of Participants in Commercial Wildlife Viewing Opportunities

	WINTER		SPRING	
	Wildlife Viewing	All Travellers	Wildlife Viewing	All Travellers
Transportation To BC				
Own Auto	72.4	43	44	41
Rent Auto	4.8	2	8	6
Camper	2.9	2	13	10
Bus	0	3	3	2
Air	26.1	54	37	40
Ferry	3.1	3	6	10
Other	0.8	1	4	3
Transportation in BC				
Own Auto	65	43	34	36
Rent Auto	8.5	18	23	28
Camper	4.5	2	12	10
Bus	8.2	13	10	12
Air	3.8	5	3	3
Ferry	2.3	2	3	2
Other	8	11	18	15
Purpose				
Business	8.7	15	9	19
VFR & Personal	50	59	31	32
Touring	22	7	35	29
City	7	3	2	4
Outdoors	4.3	7	15	8
Resort	2.8	12	5	5
Other	5	2	4	5
Party Composition				
2 Adults	52		54	
3 Adults	18		9	
4 + Adults	9		16	
Children	26.5		21	
Gender				
Male	43	49	51	49
Female	57	51	49	51

Table 6 Cont'd

	WINTER		SPRING	
	Wildlife Viewing	All Travellers	Wildlife Viewing	All Travellers
Age				
15 - 18	5	2	3	1
19 - 24	27	10	7	5
25 - 34	23	26	23	19
35 - 44	16	25	26	23
45 - 54	13	16	12	17
55 - 64	10	13	22	21
65+				
Income				
Under $20,000	29		13	
$20,000 - 39,999	41		35	
$40,000 - 59,000	15		24	
$60,000 +	16		28	
Nights in BC	6		4.5	
Party Size	2.5		2.6	
Party Expenditures	139.5		135	
Origin				
Alberta	8	30	23	21
Ontario	12	17	13	13
Other Canada	11	16	10	12
Washington	54	15	13	15
Oregon	1	1	2	3
California	1	4	9	8
Other W. U.S.	5	4	7	8
Other USA	1	3	9	7
International	7	10	14	13
Major Destination				
Vancouver Island	13		18	
Southwest BC	80		49	
Okanagan-Simil	4		5	
Kootenay Country	0		2	
High Country	2		3	
Cariboo Chilcotin			2	
North by N.West			5	
Peace River Alaska			2	
BC Rockies			14	

The B.C. Resident Travel Survey involved a telephone interview of approximately 1200 B.C. residents each month throughout 1989. Results of this survey suggest that B.C. residents took approximately 15 million overnight trips within their province each year. A smaller sample of residents agreed to complete a diary about their trip. These respondents indicated that they spent some time outdoors when their main purpose was to watch, feed or study wildlife on 23% of their trips. If these diary respondents were representative of all B.C. overnight travellers, then as many as 3.45 million overnight trips involved wildlife activities. Again, the overwhelming majority of these trips involved independent viewing.

Another source of data concerning British Columbians interest in wildlife viewing was two surveys conducted in October 1989 and April 1990. In each survey, a sample of approximately 500 adult residents were asked whether they had taken part in any wildlife activity while on trips or outings over the last six months. In October, 44% replied yes and in April, 41% also replied positively. Since this survey did not obtain information regarding the frequency of travel or whether the trip involved an overnight stay, direct comparisons with the B.C. Resident Survey are not possible. The data does, however, provide useful insights into variations in participation rates by age, income, education, gender and location which are shown in Table 7. The results suggest that women are more likely to be involved in watching, feeding or photographing wildlife than men; people in the age group of 25-34 show the highest propensity and there is a positive correlation between propensity to participate in wildlife viewing with education and income. The most popular reason cited for not participating was "lack of time" -- a reason more likely to be given by males than females, persons aged 18-24 or 45-54, and persons in high income households. The same sample of adults were asked where they would prefer to find more information about wildlife viewing.

Table 7
Variations in the Propensity of B.C. Residents to Participate in Wildlife Viewing Activities on Trips or Outings

	%
Gender	
Male	39
Female	44
Age	
18 - 24	33
25 - 34	49
35 - 44	46
45 - 54	43
55 +	31
Education	
Some High School	35
Graduate From High School	30
Post Secondary	46
University	49
Income	
Less than $15,000	38
$15,000 - 24,000	33
$25,000 - 34,000	51
$35,000 - 44,000	33
$45,000 - 54,000	43
$55,000 +	56

Source: Marktrend, Consumer Scope, April 1990

The seven sources, in order of preference, are as follows:

Newspaper	23%
Brochures	15%
Television	14%
Tourism Information Centres	10%
Wildlife Branch	9%
Library	8%
Radio	6%

In conclusion, there is strong evidence to suggest that wildlife viewing does play an important role in the travel patterns of British Columbia's residents and that there is potential to "convert" these independent viewers into customers of commercial operators that specialise in wildlife viewing activities.

THE MARKET FOR COMMERCIAL VIEWING OPPORTUNITIES

There is little solid data on the geographic origin of British Columbia's commercial wildlife viewing clientele, other than that gathered from operator interviews undertaken for this project and the 1988 Wildlife Viewing Study. The geographical markets for each operator vary considerably according to the activity and the location, and the past marketing efforts of the operator. Since volumes for each operation are small, an operator can achieve success in one market and not have to develop others which may have equal or greater potential. While these numbers are preliminary, they do give some insight into present patterns.

Table 8

Participation in Commercial Wildlife Viewing by Origin

Industry Sub Segment	Origin				
	B.C.	Other Canada	W. Coast U.S.	Other U.S.	Europe
Marine, front country	85		15		
Marine, backcountry	20	10	65		5
Land, back country	50	10	30		10

Source: Wildlife Viewing in B.C., 1988

By multiplying the origin percentages cited in Table 8 by the actual user-day totals associated with each wildlife segment, it is possible to show the percentage of wildlife viewing days currently associated with each market area.

Table 9
Primary Wildlife Viewing User-Days by Origin

Origin	# of Viewing User Days	% of Total Viewing User-Days
B.C.	22,075	70%
U.S.	7,825	25%
Other Canada	1,300	3%
Overseas	300	1%

Source: derived from Table 2 and 8

Several conclusions may be drawn from this data:

a. British Columbia's commercial wildlife viewing sector is heavily reliant upon the local market, particularly for the lower cost, mass-oriented front country operations.

b. American clientele are predominantly from the Westcoast — particularly from the Pacific Northwest.

c. American, Eastern Canadian and European clients are more interested in and willing to pay the higher prices associated with the more exotic backcountry wildlife viewing product.

d. Visitors from the rest of Canada and overseas are under-represented.

Table 10 outlines the demographic characteristics of the market serviced by operators that offer primary viewing product as identified in the market analysis of adventure travel (ORC, 1988). While the packages sold in British Columbia appeal primarily to persons between the age of 20 and 54, they also attract customers 55 and over: 38% of the water-based packages were purchased by this latter group, most of whom were travelling either as couples or a group.

Table 10
Market Characteristics Supplied by British Columbia Nature Observation Operators

	NUMBER OF PACKAGES		
	Land-Based Photographic Tours %	Water-Based Photographic Tours %	Boat Tours %
Age			
Under 20	12	5	7
20 - 34	25	20	12
35 - 54	43	37	43
55 - 64	19	26	26
Over 64	2	12	12
Sex			
Male	54	55	56
Female	46	45	44
Party Composition			
Families	20	11	16
Couples	28	43	40
Singles	19	11	12
Groups	34	34	32
Origin			
British Columbia	17	29	42
Alberta	7	7	12
Canada	7	12	2
Washington, Oregon	16	15	10
California	16	13	16
Other U.S.	13	9	12
Overseas	24	15	7

Source: Outdoor Recreation Council questionnaire survey of British Columbia operators, 1987

The research on propensity to participate in wildlife viewing has demonstrated a strong correlation between education and income. According to the National Survey of Fishing, Hunting and Wildlife Associated Recreation, conducted by the U.S. Fish and Wildlife Service in 1980, participation rates in wildlife viewing ranged from 30% for people with seven years of schooling, to more than 70% for those with one or more years of college. The national survey also found that the highest participation in non-

consumptive activities occurred where there was a household income exceeding $30,000 in 1981 US dollars.

Further insight into the characteristics of the market potentially interested in buying wildlife-oriented packages may be gained from the subscriber/member profiles of Sierra Club Magazine, National History, the Wilderness Society and Outdoor Photographer (Table 11). The data demonstrate the appeal of this activity to highly affluent, educated and active people.

The birding community is characterized by a very high education levels. For example, a study undertaken at Point Pelee - a major birding area in Ontario - found that of 1005 people interviewed, 89.6% of birders had a college degree and 29.9% had a masters or doctorate. (In the general public, only 7.1% of Canadians and 14.0% of Americans hold a college degree.) The major birding magazines found similar education profiles in their readership: 51% of readers of Bird Watcher's Digest and 76% of Nature Canada readers had a college degree. It is likely that such education levels would apply to other expert level wildlife watching.

Table 11
Readership Profiles of Selected Nature-Oriented Magazines

	Sierra Magazine 1	Wilderness 2	Natural History 3	Outdoor Photographer
Paid Circulation/ Members	310,561	160,000	502,000	100,000
Sex				
Male	52%	54%	56%	85%
Female	48%	46%	44%	15%
Age				
Median Age (Yrs)	40		49	39
25 - 49	79%	n/a	68%	n/a
65+	9%	23%	21%	5%
Income				
Median Household Income	$46,100	n/a	$49,200	$36,000
$25,000 +	86%	72%	79%	76%
$35,000 +	69%	n/a	n/a	48%
$50,000	42%	32%	48%	n/a
Education				
Attended College	98%	92%	82%	n/a
Graduate Work	65%	50%	44%	n/a
Leisure Activities	%	%	%	%
Backpacking	33	30	32	70
Bicycling	53	33	34	26
Bird Watching	38	n/a	36	
Camping	48	30	24	59
Canoeing	26	24	n/a	30
Climbing	15	n/a	n/a	n/a
Fishing	28	17	n/a	37
Hiking	66	62	See BackPack	
Sailing	27	n/a	25	n/a
Skiing-Alpine	22	n/a	9	28
Skiing X/C	34	n/a	11	n/a
Nature Photography	n/a	29	n/a	74

Source: Sierra , Wilderness, Natural History and Outdoor Photographer 1986 readership profiles

6. MARKET SEGMENTS WITH GREATEST POTENTIAL

BRITISH COLUMBIA

The resident market for wildlife viewing dominates both the commercial and non-commercial market, accounting for 70% of the primary commercial wildlife viewing customers (see Table 8) and 60% of the non-commercial use associated with overnight travel (see Chapter 5). Since as many as 40% of the adult population in British Columbia claim to have spent time watching, feeding or taking photographs of wildlife during their travels, it is clear that residents will continue to play the major role in the wildlife viewing industry.

The key challenge will be to "convert" residents who have shown a propensity to participate in wildlife viewing activities on an independent, non-commercial basis, into consumers of commercial products (i.e., packages that include naturalists and guides) Certainly many British Columbians would not be interested since they consider the chance to watch wildlife free is a "birthright" as a citizen of the province. However, given their interest in wildlife viewing, even these people (as well as others) might be interested in a commercial product if they realized that they would get a better viewing experience. For example, residents are quite prepared to pay the extra cost of a boat trip to watch whales as this enables them to get close to the animals which otherwise they would have to watch at a distance from shore. Similarly, the provision of expert naturalist interpretation may be sufficient enticement to interest locals to pay for wildlife viewing. Assuming that such techniques would work, a strong marketing program will still be required to convey such advantages to the resident market so as to overcome their natural predilection to go and view wildlife on their own.

British Columbia supports an established naturalist and bird-watching community, though little data is available on this group. One measure is the membership of the Federation of B.C. Naturalists: 8000 people - a significant and easily targetable group of individuals who spend an exceptional amount of time on viewing. Beyond the Federation, in each region of the province there are non-affiliated naturalists, birders and outdoors people with an interest in wildlife viewing. There are also school, community, youth and church groups which take advantage of wildlife viewing opportunities. Since these groups can often undertake viewing on their own, they do not constitute a large market for commercial operators.

REST OF CANADA

Visitors from other Canadian Provinces and the Territories accounted for 3.4 million person trips in B.C. with 30% of revenue generated coming from the Alberta residents. The proximity of this group to B.C. assures a reasonably stable source of visitors, including a large rubber-tire trade: a total of 61% of Albertans arrive in B.C. in their own automobile.

Alberta is a major market for the eastern portions of the province - particularly the East Kootenays. Since many of the wildlife species found in B.C. also occur in Alberta, wildlife viewing operations here have less 'exotic' appeal. Alberta may have limited potential for B.C. wildlife viewing operators. One promising area involves marine species, e.g., Whales. These animals are considered exotic by Albertans, yet the chance to view them is within reasonable driving distance.

The Ontario market demonstrates considerable potential. Nearly 820,000 residents of this province visited British Columbia in 1989 and spent $528 million during their stay . Ontarians spent more per day on their travels than any other visitor group except the Japanese. Ninety percent of visitors from Ontario arrived by air and while many of these traveled for business purposes, their propensity to combine business with pleasure appears to be increasing. A significant percentage of these trips, particularly conference trips, could create a stable market base upon which wildlife viewing operations could capitalize on the Lower Mainland and southern Vancouver Island.

UNITED STATES

The importance of wildlife viewing to Americans has been demonstrated by the 1985 National Survey of Fishing, Hunting and Wildlife Associated Recreation, undertaken by the Fish and Wildlife Service of the U.S. Department of the Interior. That survey showed that over 29.3 million Americans (16% of the population) took a trip away from home primarily to observe, photograph or feed wildlife and spent $4.4 billion US on trip-related items. Bird watching was the most popular activity -- involving 25 million of these primary participants. Land mammals (Bears, Deer, Rabbits, Coyotes) provided the second greatest source of enjoyment involving 23.7 million. Of importance to British Columbia operators is the fact that 49% of the adult population stated that they enjoyed wildlife viewing while on a trip for another purpose. Since the total number of American visitors spending a night or more in British Columbia in 1989 was 3.2 million, as many as 1.6 million are likely to be potentially interested in British Columbia's wildlife resource.

According to Visitor '89, the largest U.S. markets are as follows:

Washington	34%
California	21%
Oregon	10%
Other western states	21%
Eastern states	14%

Source: Visitor '89

The above figures clearly demonstrate the importance of the west coast region: a total of 65% of the U.S. market is associated with 3 states. The main method of travel from the Washington, California and Oregon markets is by private automobile (68%) with an additional 15% arriving by recreational vehicles. This west coast U.S. region already represents a prime market for British Columbia's adventure travel sector. It undoubtedly will be a major source of wildlife viewing clients in the future.

These visitors tend to focus on frontcountry sites — especially interpretive facilities such as those found at Creston. Development of more frontcountry sites would not only appeal to this geographical market, but would serve to hold such U.S. visitors longer. With time and a developing knowledge of the B.C. wildlife resource, it is possible that a significant number of these travellers could be encouraged to return to participate in more expensive wildlife viewing primary product associated with the mid/backcountry.

It is important to remember that the "rubber-tire" component also includes tour buses. Given the proximity of B.C. to the west coast states, the quality of wildlife viewing opportunities to be found in B.C., many of which are on or close to highways, and the increasing interest of seniors and organized groups for the soft adventure wildlife viewing product, a potential frontcountry opportunity.

The eastern U.S. market is more difficult to attract. B.C. is too distant to appeal to that region's rubber-tire travellers. As well, B.C. wildlife viewing must compete with the better known and similar opportunities found in the western U.S, especially Alaska. Where B.C. product may compete in the eastern U.S. market is with the high quality wilderness backcountry packages.

INTERNATIONAL MARKETS

According to the report entitled *The Challenges in Tourism Product Development* (Tourism Canada, 1988), increasing urbanization of the world's population is resulting in an increasing demand for open spaces, clean air, forests, rivers and lakes, all of which Canada has in abundance. Accordingly,

this study notes that outdoor/sport/adventure product (a trip to a single destination to experience nature and outdoor activities) accounts for 24% of total international demand and 30% of total domestic demand. Such market trends suggest that the potential exists to expand into international markets and increase revenues from the small, but affluent segment that is interested in adventure product, such as backcountry wildlife viewing.

Overseas markets represent 10% of the overnight, non-resident visitor market to B.C. These visitors generate 15% of non-resident tourism revenues. According to the Ministry of Tourism, in 1988, the top markets were Japan, United Kingdom, West Germany, Hong Kong and Australia, in that order.

The first three, Japan, the United Kingdom and Germany, merit the most attention and are discussed below. The Hong Kong travel pattern is primarily an urban-oriented phenomenon, so wildlife viewing would have minimal appeal to this group. The Australian component, although potentially quite interested in wildlife, represents a smaller scale market that has less potential in the near term.

Japan

While Japanese visitors only represent 3% of non-resident tourists to the province, they are affluent. This market is known for its group travel approach to high profile areas of the province, e.g., Whistler. It is generally assumed that the Japanese market will continue along this path, with a preference for travelling in large groups, seeking luxury accommodations and staying for very short time periods in any one location.

Since 1987, Canada has experienced an ongoing increase in Japanese visitors. This is largely due to an international trade deficit agreement and not necessarily as a result of marketing tactics. This agreement included doubling exiting airline seat capacity out of Japan every year between 1987 and 1992. This indicates that B.C. will probably experience a levelling off of this market growth after 1992.

The Japanese travel market is particularly susceptible to fads and fashions and is to a large extent controlled by a relatively small number of vertically integrated travel companies that handle high volumes. While some small operators have enjoyed successes introducing innovative new products such as "stay-put vacations" in mountain resorts, their numbers are very small.

A survey on consumer expectation from travel, carried out by a major Japanese newspaper, found that people gave such varied replies as "relax for an extended stay in one place", "have the opportunity to get a real feel for the lifestyles of some country", and "try some adventure". These changing cultural patterns and the high disposable income of this market dictate that it should not be ignored.

It is important to determine just what adventure means to the Japanese and, therefore, to what degree a B.C. adventure tourism product such as wildlife viewing will appeal to Japanese visitors. Tourism Canada has reported that the Japanese find Canada's clear strength in its quality, natural environment - its national parks, forests and wildlife. However, it would be easy to assume that this could translate into a major interest in adventure as North Americans commonly perceive it. This may not be the case.

Japan is a heavily populated, urban culture whose people are unaccustomed to and even intimidated by the thought of wilderness. As a result, there is much less of an inherent desire by Japanese to experience wildlife - and especially wilderness - than for example, German or British visitors.

For over 1,000 years Japanese society has developed an extremely strong tradition of group cohesiveness; individual awareness - by western standards - is surprisingly undeveloped. Because of this, the Japanese preference for group travel has developed and is likely to prevail. Japanese typically see themselves as distinct from non-Japanese and prefer to travel with their countrymen. Language is yet another barrier that helps to sustain the preference for group travel. As an exception to this, it is becoming more common for the occasional younger, more adventuresome Japanese that speaks enough English to travel on their own. However, targeting this traveller would be difficult, since Japanese travel wholesalers focus on volume.

Finally, the Japanese work ethic is such that these travellers tend to choose shorter vacations (typically 1 week in length). Given the time required to travel to B.C. from Japan, this means that Japanese visitors will be reluctant to travel to wildlife viewing sites that require additional travel time.

What this means for B.C.'s wildlife viewing industry is that the most likely product to interest the Japanese market will be day-trip, frontcountry-oriented operations which focus on easily accessible wildlife sites in the vicinity of already recognized destination resorts (e.g., Whistler and Banff, Alberta). The orientation should be on group tours - using vans or buses - with a guide fluent in Japanese. Such product should be packaged with other soft adventure offerings and marketed via a Japanese wholesale travel company.

Experience with other adventure tourism sectors (e.g., heli-skiing in the Rockies), shows that the Japanese market can take years to penetrate. Japanese wholesalers are cautious about new offerings. They focus on volume and have minimal interest in operations which deal in small numbers and require custom packaging.

In conclusion, the Japanese market is likely to be relatively small. Wildlife viewing will be an incidental activity associated with heli-hiking and river rafting which are beginning to appeal to younger, independent and frequent travellers. Operators wishing to capture more Japanese business might be

advised to contact agencies responsible for organizing English study programs and include the product in the students list of recreational options.

West Germany

West German visitors currently represent 11% of the overseas market to B.C. and yet generate 16% of the overseas tourism revenues. The West German market is recognized as a strong supporter of adventure wilderness product. In the Tourism Canada report, 51% of the West Germans indicated that observing wildlife or birds was a preferred travel activity. Out of a total of 28 destination attributes, German respondents ranked wildlife 14th in importance. They also indicated that wildlife was Canada's top rated attribute compared to other destinations. Germans are especially interested in the opportunity to view wildlife in natural areas. They will actively seek out midcountry and backcountry experiences and rustic atmospheres.

Stringent advertising laws in Germany dictate careful scripting in brochure copy and creates a cautious purchasing pattern from the German wholesalers when approaching new product offerings. Rarely will a German wholesaler risk dealing with a small operator who approaches them on their own. If the B.C. wildlife viewing product is to successfully access this market, close cooperative effort with German travel wholesalers, suppliers, the air carrier and the Tourism Ministry will be required.

United Kingdom and France.

Awareness of Canada as an attractive destination is increasing in both these markets. The French pleasure travel market rated wildlife seventh out of a list of 28 attributes. Like the Germans, the French market also rated Canadian wildlife very highly, indicating that wildlife was Canada's second rated attribute. The British travel market ranked wildlife fourteenth out of the 28 attributes, similar to the German market, but less important than either the French or the Swiss. Like the Germans and the French, the British consider wildlife one of Canada's strongest attributes.

Wildlife is a more important destination attribute for European travellers than it is for U.S. travellers. Unlike the U.S., Europeans have few wildlife resources and view Canadian wildlife species, such as Grizzly Bear, as truly exotic. As a result, it assumes greater significance as a trip attribute. Europeans also consider wildlife to be one of Canada's strongest attributes.

MARKET SEGMENTS BY MOTIVATION

Understanding what motivates travellers to purchase wildlife viewing vacations is a critical prerequisite to devising effective market strategies and responsive product development. Research into adventure tourism reveals that the market can be subdivided into three segments. These are:

a) Casual Adventure Travellers are the entry-level adventurers experimenting with new and challenging outdoor activities. They take short, one or two day trips in order to get a 'taste of adventure'. This market affords the greatest potential growth for the wildlife viewing industry in the near term since the opportunity exists to convert rubber-tire and city-based tourists into wildlife viewers for short trips to easily accessible frontcountry sites.

b) Committed Adventure Travellers are the most affluent segment. They are fitness conscious, in the middle to upper income brackets, between 30-55 years old, highly educated and reside in urban centres. This somewhat elite group regards adventure travel more as a growing and learning experience than as a 'thrill'. They tend to be trendsetters, are most likely to choose exotic destinations and many view their travel as a status symbol. They make frequent trips and while wishing to participate in some form of active recreation, they also wish to enjoy the good life. Committed adventure travellers both demand and are willing to pay for quality accommodations, services and fine dining. Since this market constitutes the 'cream of adventure travellers', competition for their patronage is very stiff and marketing costs are very high.

c) Expert Adventure Travellers are those people who are on their way to mastering a sports-related skill or knowledge about a topic. In the case of wildlife viewing, these are the ones which are the ardent birders - especially those who are intent upon developing an extensive "life list" of viewed species. For this market segment the motivation of a trip has shifted from general growth and exploration to fine tuning of a particular skill. Most Expert Adventurers are actively involved in their chosen activity and will likely belong to clubs or subscribe to specialty wildlife magazines. (Tourism Canada, 1988)

The commercial operator's main source of clients is based on committed and/ or expert adventurers. Raising the profile of wildlife viewing through the establishment of frontcountry viewing sites can augment this by increasing the awareness of casual adventurers and encouraging them to seek out commercial guides. This increased demand will also lead to the need for and the creation of more product. Casual viewers will tend to be involved in secondary product. However, they may be enticed into a primary wildlife offering (e.g., Whale watching at Tofino)

Frontcountry viewing sites will be by far the most important for the casual adventurer. These people may tour an interpretive centre or watch animals from a roadside viewpoint as part of their more general travel experience. Once this type of adventurer has had a positive frontcountry viewing experience, the opportunity exists to encourage repeat visitations into a region for a primary activity in the front, mid or backcountry zones. It is, therefore, important for the commercial operator to recognize the potential of such upgrading of the casual participant to a more committed status. The casual traveller will likely happen upon a wildlife viewing opportunity as part of car or bus vacation, or as a recreational event on a convention program. .

Expert adventurers tend to be active in associations and special interest clubs relating to the activity. Specialized media and marketing activities (e.g., specialty birdwatching tours advertised in Audubon magazine) are the best approach to this market, as presently practised in the industry.

7. CURRENT MARKETING SITUATION

MINISTRY OF TOURISM

The Ministry of Tourism undertakes the tourism marketing program for the province as a whole, supports and coordinates the programs of the nine B.C. Tourism Regions and provides assistance to individual operators through the support of sector associations. The Ministry's marketing efforts also include the local Tourism Information Centers, Trade and Consumer show attendance, cooperative advertising plans, and a consumer 800 number inquiry fulfillment service.

The bulk of the Ministry's advertising efforts focus on awareness-raising campaigns, rather than a vertical (product specific) approach. Opportunities for operator involvement in specific product promotion is provided by the Ministry through vehicles such as the Outdoor and Adventure Guide and travel writer sponsorships. Similarly, Ministry staff in national and international offices assist in coordinating regional trade and consumer shows. In this case, operators are encouraged to provide material for distribution at these shows.

The basis of British Columbia's promotional strategy is to market the "Super Natural" aspects of the province. This campaign has been extremely successful and is now an internationally recognized symbol of what B.C. offers visitors. *From the standpoint of wildlife viewing tourism, this provincial tag line is very complimentary to the marketing image that the product requires.*

OTHER AGENCY MARKETING PROGRAMS

There are a number of other agencies that undertake marketing by providing printed material or services which relate to wildlife viewing.

- B.C. Ferries, for example, produces a full colour brochure that includes mention of wildlife viewing opportunities.
- B.C. Parks also produces substantial material on the provincial park system and actively promotes the maintenance of wildlife populations, though as yet only limited specific information is presented about viewing opportunities.
- MacMillan Bloedel has recently initiated a program including a booklet on wildlife viewing on or near their forest lands.

- The Wildlife Watch Program is developing a strategy for promotion of frontcountry and midcountry sites.

- The Wildlife Interpretation Centers located at the Reifel Sanctuary and the Creston Valley Wildlife Management Area also undertake local marketing programs.

THE COMMERCIAL OPERATOR

The commercial operator can sell wildlife viewing directly on-site, with brochures and signage. Additionally, he/she can engage in more sophisticated marketing by packaging a series of products for volume sales through an intermediary. Options then exist for these packages to be directed at the organized group coach market (G.I.T. - Group Inclusive Tour), the independent traveller visiting the province (F.I.T. - Foreign Independent Travel), or at the local B.C. market.

A few of the larger adventure operators which provide secondary nature observation activities, including saltwater fishing lodges and resorts, some freshwater fish camps, tour/adventure operators, and a few guide/outfitters, use the latter approach to reach both resident and non-resident markets. However, the majority of the small adventure sector operators have inadequate budgets to do anything but simpler direct marketing. To date, these operators have not needed to increase their budgets since they have been operating at an acceptable level of sales for the amount of product they offer.

Wildlife viewing operators indicate that the bulk of reservations are received directly from the consumer as a result of the following marketing efforts:

- word-of-mouth;
- personal sales through clubs, associations, slide shows and speaking tours; and
- direct mail campaigns.

Primary operators indicate that 65% of reservations are received directly from the consumer, whereas 25% are the result of travel trade support from wholesalers and 10% are from travel agents.

This heavy reliance on personalized selling and little use of the established travel trade for marketing, results from the suppliers conviction that bookings are best made through direct personal sales. Developing a reputation for product quality, reliability and consistency takes precedence over extensive marketing programs. Since most operations are small,

personal service by the operator is an important aspect of what they provide and use to attract clientele. Since the personality of an operator is so critical to this element of service and is not something that can be "marketed" through wholesalers, personal selling has shown to be the best selling technique.

In the telephone survey of adventure operators and suppliers, the following marketing activity and advertising budget allocations were noted:

71% -expenditures in B.C. and Alberta
24% -expenditures in the U.S.
5% -expenditures in international markets.

This survey also indicated that 70% made reference to incidental viewing opportunities in their published product, and although 100% indicated an interest in increasing the wildlife viewing content of their packaging, many expressed concern about a lack of resource knowledge and indicated a need to have assistance in targeting new wildlife viewing markets.

THE TRAVEL TRADE

Very few operators in British Columbia sell their product through the travel trade. It was interesting to note that only one operator considered it a necessary part of marketing to offer travel agencies a commission. This is not overly surprising, since in B.C. it has been common for many sectors of tourism to resist the two-tier commission structure pricing that is necessary when marketing through travel agencies and wholesalers.

As a result of the complex and fragmented nature of tourism product, an extensive distribution system has developed for the purposes of packaging, wholesaling and retailing travel products. The travel trade is comprised of three main components:

a) Wholesale G.I.T. and F.I.T. Operators, based in the country of market origin. While there are literally thousands of wholesalers around the world, relatively few package travel experiences that are related to adventure and which involve wildlife viewing.

b) Wholesale Receptive Operators, Destination Managers and Ground Operators, package both their own product and manage the product of others. They are based at or near the source of supply. Appendix C contains a list of receptive operators in B.C.

c) Travel Agents who retail generic product and who sometimes package their own product. The Airline Quick Reference Guide(1989), indicates that in North America alone there are over 35,000 travel agencies. To

make sales however, these agencies are dependent upon the information that is available to them. As the study entitled *Adventure Travel in Western Canada: A Product Development Strategy* (Tourism Canada,1988) stated, the travel trade as a rule, is not provided with enough information on adventure opportunities, and does not consider it in their offerings.

For the purposes of this study a small random number of retail travel agencies were telephoned for their reaction to B.C. as a wildlife viewing destination. These agencies were selected from March 1990, New York and San Francisco newspaper advertisers that mentioned an adventure product in their advertisement.

All of the agencies called indicated that they only sold international adventure packages and did not consider B.C. (and Canada) an international destination. Without exception they noted that B.C. does not have a wildlife profile, that an "exotic" image is lacking and that product/package knowledge is not available in most agencies. They stated that clients and consumers who request an adventure product in B.C. are simply turned away or directed to the nearest British Columbia Tourism office.

Despite the spectacular opportunities found here, B.C. is poorly known in the adventure travel market. *Specialty Travel*, a trade magazine that is used extensively by travel agencies as a source for booking adventure travel, revealed that B.C. is severely under-represented in this arena. Of a total of 12,600 listings, only 40 were located in British Columbia, compared to 740 in Alaska , 300 in Wyoming and 210 in Montana.

INTERNATIONAL MARKETING

To date only limited international marketing has been undertaken by B.C. adventure tourism operators. This is largely due to the tremendous expense which must be incurred to promote a small isolated product to off-shore markets. The best solution to this is achieved through cooperative measures between operators, regional tourism associations, sector associations and the Ministry.

International marketing is a complex and difficult marketing area. Problems facing B.C. include:

1. Language barriers and cultural differences

2. Distinct product packaging methods used by overseas wholesalers and retailers.

3. Only rarely will an overseas tour operator deal directly with an individual supplier in British Columbia. Traditionally, they associate themselves with an established Receptive Operator (destination manager) based in British Columbia. This enables the overseas tour operator to obtain wholesale rates and product security from an array of local suppliers.

   The need for local product management and quality control is essential to the offshore buyer and further encourages the use of such locally based Receptive Operators. This means that individual B.C. adventure tourism suppliers will benefit more from alignment with British Columbia-based Receptive Operators than by attempting to undertake direct marketing thrusts overseas on their own.

4. There are both large and mid-size tour operators based in Germany, the United Kingdom and Japan. These operators control close to 90% of the international outbound travel markets in those countries. They can best be accessed through international tourism trade shows such as Rendezvous Canada. Again, it is far more advantageous for B.C. operators to reach these tour operators through such venues and preferably using a receptive operator, rather than to attempt to travel overseas and locate potential buyers directly.

5. In addition to the clients provided by the "wholesale trade", there is the rapidly expanding independent traveller market. This market is impossible to reach by a visit overseas. Instead, it can best be accessed through coverage in specialty media. This process involves slow, long-term cultivation. A key function of the B.C. Ministry of Tourism's international marketing efforts is to achieve such coverage for local product.

In general, wildlife viewing operators wishing to market internationally are advised to appreciate the potential obstacles and to therefore first seek council from the Ministry of Tourism.

8. ISSUES

There are a number of important issues which must first be discussed before a proactive marketing strategy for wildlife viewing is undertaken. These are as follow:

1. SOCIETAL VALUES OF WILDLIFE VIEWING TOURISM

Wildlife viewing tourism is important to society for several reasons:

a) It generates significant revenues and employment.

b) As a secondary product, it enhances the attractiveness of other B.C. adventure tourism offerings, thereby increasing their competitiveness in continental and international markets.

c) It widens the activity range available to all travellers and encourages them to stay longer or visit locations they might otherwise bypass.

d) It heightens environmental awareness, both of residents and non-residents.

e) It provides an economic argument for the retention of quality wildlife populations and the habitat they depend upon, thereby creating environmental benefits.

2. GOVERNMENT'S ROLE IN WILDLIFE VIEWING TOURISM

At present a high percentage of the wildlife viewing industry - particularly those providing the primary product - is associated with 'lifestylers'. These operators have chosen to offer viewing product as much for the revenues it generates, as for the quality of living it affords them. Many such operators are uninterested in expanding beyond a size that is personally manageable by one or two people. Since successful operators have the demonstrated ability of reaching this point and then levelling off their business, it can be asked: Why and how should government be involved in this sector?

Government can assist industry in four ways:

a) *Assist existing operators to grow:* Since many existing operators neither want to grow dramatically, nor need assistance to prosper, this type of governmental help is less required.

b) *Enhance the value of the sector:* Increasing operator revenues per client can lead to greater profits and spin-off benefits. This can lead to high value rather than high volume product, which in the case of wildlife viewing can have positive environmental benefits.

c) *Expand the wildlife viewing sector by adding new operators:* While established operators may feel self-sufficient, the same may not be true for new or prospective operators. New operators have a demanding start-up period: the first 3 to 5 years. This is when they have to create their product, create market awareness and locate their clientele, and develop cashflow. For their part, prospective operators need training in marketing resource values and interpretation and business skills. In both cases, government has a clear role to play in terms of training, marketing assistance, resource information and financial assistance. The benefits of such involvement to the province will be the creation of new wildlife viewing jobs and revenues as the sector grows.

d) *Protect the environmental integrity of the wildlife viewing resource:* Wildlife and its habitat is important to society beyond its value to the viewing industry. It is government's role to ensure that the resource is husbanded. In working with industry, this means that government should lay out management regulations. As well, it should ensure that its support services to industry (marketing, financial, research, training) are environmentally appropriate. Since tourism growth can be rapid in response to aggressive marketing, plans to assess and avoid negative impacts should be undertaken prior to the start of marketing activities. When animals are photographed using telephoto lenses, for example, this information should be imparted to the consumer so that they understand it would be inappropriate to try to get as close to the animals as the picture would suggest was possible.

3. DOES WILDLIFE VIEWING MERIT GOVERNMENT INVOLVEMENT?

Given that the primary wildlife viewing industry is worth $2.5 million annually in revenues, the level of government involvement that can be justified for this sector requires clarification. There are a few factors to consider:

a) If wildlife viewing is considered to be a growth sector, then government's involvement can be seen as an investment geared to the creation of new jobs and revenues.

b) As a secondary product, wildlife viewing is worth $16.5 million. This scale of revenue better justifies government marketing expenditures,

especially when development of further secondary wildlife viewing product will serve to strengthen and expand other adventure tourism sectors (e.g., rafting, guide- outfitting, and dude ranching).

4. GOVERNMENT'S MARKETING RESPONSIBILITIES

Existing operators generally believe that the marketing of their product is most effectively done by themselves. They think they are better at representing their product to prospective clients, locating suitable new clients and making sales, than if they were to entrust marketing to government.

The evidence suggests that these operators are correct since most operations operate at close to capacity. This is especially so for well-established operations (5 years or more) that attract their clientele through word-of-mouth, personal speaking engagements or a customized mail list. It is important to realize that in wildlife viewing - as with other adventure tourism operations - a large proportion of the annual clientele are return visitors.

While operators agree that specific product marketing is best left to them, they see a role for government in providing generic-level advertising to inform the public (especially the distant markets) as to the world-class quality of B.C.'s viewing resource. The role of government is to develop new markets that individual operators can then access. Creation of a Wildlife Viewing Guide, modelled after or perhaps incorporated within the successful Outdoor and Adventure Guide is desirable. A media campaign incorporating magazine ads, TV and radio spots, and posters is needed. Government can further this program with support of familiarization trips, outdoor writer sponsorships, cost-sharing of operator brochure production, and involvement at key travel shows.

5. LIMITED PRODUCT AVAILABILITY

While the original intent behind this report was the creation of a marketing strategy, review of the wildlife viewing industry reveals a limited availability of product. Given that most existing businesses are thriving largely on the basis of their own marketing efforts, the need for a comprehensive government marketing thrust at this time seems questionable. The risk is that such marketing could create a level of demand which would exceed the capability of the existing industry to service it.

Therefore, an early step in government's wildlife viewing program must be to encourage new product to come on line. This effort should probably precede the launching of a comprehensive marketing thrust.
New product can be developed in two ways:

a) Increase the number of operators offering already existent wildlife viewing products, especially in locations presently unserviced. For example, whale watching is a well-developed activity at Tofino and Robson Bite. There may be other unutilized locations on the mid or north coast where operations could be started up. Note: When increasing the number of operators in any one location, caution must be exercised not to "over-use" or over-stress the viewed wildlife.

b) Diversify the product line. Some important potential wildlife products are not yet offered. Some of the best opportunities are located in the Midcountry (e.g., for Grizzly Bear)s. Midcountry viewing offers an intermediate step between the high-priced, remote wilderness experience, and the more developed, lower cost frontcountry offering.

Government actions to achieve new product should include:

- identifying economically viable and environmentally acceptable sites for viewing
- training of prospective operators in skills such as nature interpretation, business management, guest hospitality, marketing, etc.
- generic marketing programs.
- research on customer preferences
- protection of critical wildlife habitat to ensure the long-term viability of wildlife viewing as a commercial enterprise.

6. LANDBASE AND RESOURCE SECURITY

When interviewed, most operators saw opportunities for the expansion of the sector; however, they felt that future product development would be constrained by one major factor. At many important viewing sites, both the wildlife resource and the associated viewing opportunities are threatened by extractive resource uses that could seriously impair the wildlife resource. High value sites require outright preservation. Examples of these sites include: Whale gathering areas (e.g., Robson Bite), waterfowl nesting and staging areas (e.g., Columbia Valley marshes), prime ungulate winter range (e.g., southern Rocky Mountain Trench), and high density Grizzly Bear use areas (e.g., Babine River). Such preservation must often include protective measures for the surrounding viewscape as well.

Many of B.C.'s most important sites for wildlife viewing are located on land where logging, mining and other industrial activities may occur. These uses are often incompatible with the kind of quality wildlife viewing the operators must provide if their businesses are to be viable. In addition, some other forms of tourism such as heli-skiing are also incompatible with wildlife viewing. As a result, businesses on such lands - regardless of the present quality of wildlife populations - are in jeopardy from clearcut logging, road construction, mineral exploration and other developments and users. Such insecurity discourages operator investment in facilities or business expansion. As well banks are reluctant to lend money to operators when their long term future can be jeopardized by other interests.

By contrast, sites that are protected in national and provincial parks and wilderness areas are much more secure. Wildlife viewing businesses do well here. In many areas, particularly in southern B.C., there are few expansion possibilities due to the limited extent of the protected land base, especially in high value wildlife areas.

Before extensive wildlife viewing marketing can be effective, more product must be created. In turn, the key wildlife viewing habitat upon which this product is based, must be protected. This means that more parks, wilderness areas and wildlife management areas will be required if the wildlife viewing sector is to expand. Such resource protection is imperative if B.C.'s internationally significant wildlife viewing potential is to be realized.

7. MARKETING AND PRODUCT VALUE

Many of the wildlife viewing lifestyle operators make modest incomes since they often compete amongst themselves for the off-the-highway resident market. They offer a lower cost product than might be the case if they could sell to the higher-value, national and international markets. The problem is that most small operators presently have neither the money nor the know-how to reach beyond the region (B.C., Alberta, Pacific Northwest) to markets in California, eastern North America and abroad.

This status quo approach not only results in reduced revenues, employment and spin-off benefits, but can also lead to more impact on the wildlife resource. More people must be moved past wildlife for operators to make a living than would be the case if a higher visitor price could be realized. In other words, if economic and environmental values are to be optimized, the goal should be to increase product value rather than to increase volumes. This can be accomplished by the packaging of wildlife viewing product along with accommodation, transportation, and other adventure travel activities. Once packaged, the product can be marketed through travel agents and wholesalers to higher-value distant markets. In so doing the urge to simply

go for mass sales (e.g., as occurs with the cruise ship industry) must be avoided. Otherwise unacceptable environmental impacts will occur. B.C.'s wildlife viewing packages must, therefore, be sold via specialty adventure wholesalers who themselves aim for the high value, but lower volume specialty markets.

8. ENVIRONMENTALLY APPROPRIATE MARKETING

The 1988 study *Wildlife Viewing in British Columbia*, stressed that development of wildlife viewing tourism must be undertaken in an environmentally sound basis.

Since marketing helps generate and target use, publicity and advertising also must be environmentally appropriate. The Wildlife Zonation System provides a basis to accomplish this. For example, while promotional material may use pictures from the backcountry and other environmentally sensitive sites (e.g., Spatsizi Park) in a generic, non- specific manner to establish the British Columbian product image, such fragile sites should not receive high-profile focused publicity. Otherwise, overuse and environmental deterioration could rapidly result. Rather, advertising should direct intensive use to resilient frontcountry sites. For these locations, mass-oriented publicity should be site and package specific (e.g., brochures, media advertising).

9. WILDLIFE VIEWING TRADE ASSOCIATION

Of all the adventure tourism sectors, wildlife/nature viewing is currently the only one which has yet to organize its operators into a trade association. Such a Wildlife Viewing Tourism Association could help accomplish the following:

- establish cooperative marketing actions amongst individual operators;
- represent the sector's marketing needs;
- represent the sector's resource management needs;
- develop training requirements;
- develop a wildlife viewing Code of Ethics and operating standards to ensure that the quality of the resource the industry depends upon is not diminished.
- This association could also focus on the resource problem associated with wildlife viewing. In this regard, the Association and its members could seek to work co-operatively with other non-commercial wildlife viewing and environmental interests, as well as Government, to ensure that the sector's activities are environmentally appropriate.

It should be noted that the potential for such a Wildlife Viewing Association to overlap with existing tourism sectoral associations (e.g., Guide and Outfitters) is possible. Discussions with existing wildlife viewing operators and affected associations should be undertaken to determine how and whether to create such an organization.

10. INFORMATION DEFICIENCIES

A lack of data on wildlife viewing customer preferences currently exists. Even with interview information from operators, it is still not clear as to what types of services or products customers prefer. As well, the demographic data provided in the Visitor '89 survey is inadequate due to the fact that questions regarding viewing were not included in the summer portion. The Resident Travel Survey will provide some indication of the overall size of the market in terms of non-commercial participation, but does not provide information on the willingness of this market to purchase commercial packages and if so, where, in what form and at what price.

An early requirement is for a survey of wildlife viewing tourists - both resident and non-resident - to determine:

- their current and potential participation level in commercial wildlife viewing;
- whether such participation involves primary or secondary activity;
- product preferences; and
- socio-economic characteristics (especially as they relate to education and income levels).

11. HUNTING AND WILDLIFE VIEWING

Integration of hunting and viewing is essential to the successful, sustained development of both activities. As far as wildlife viewing interests are concerned, direct encounter with hunting parties reduces the quality of viewer experience. Wildlife also becomes more wary and harder to view when hunted. From the consumptive perspective, improperly managed viewer activities can cause game to leave an area, with the result that hunting success or quality of experience declines.

Given the varying philosophical perspectives that sometimes characterize participants of each group, an integrated management policy is required to avoid conflict. Techniques such as access control, directing use to different seasons, and guide licensing must be used to meet the needs of both the viewing and consumptive wildlife user.

12. NATURE VIEWING

Although this study was commissioned to address wildlife viewing, it is clear that wildlife are only an aspect - albeit a key one - of the natural world. Given the fast emerging holistic interest in the environment, it might be preferable to promote and package B.C.'s wildlife within a broader context of 'nature viewing'. This approach is appropriate since wildlife are inseparable from the habitats and ecosystems in which they exist.

Promoting under the title of nature viewing would also allow non-wildlife offerings, such as geological features, flowers and vegetation, to be emphasized. This would strengthen the B.C. product and appeal to a wider market. It would also enable the non-wildlife attributes of B.C.'s natural environment (e.g., the diversity of ecosystems from alpine to deserts, from sea-coast to prairie) to be taken advantage of as a marketing feature.

9. MARKETING STRATEGY

STRATEGIC CONSIDERATIONS

Given the issues outlined in the previous chapter, a strategy for marketing the commercial component of wildlife viewing should be based on answers to the following strategic questions:

1. What levels and rates of growth are realistic and should be set as targets?

2. What economic return would be generated if those targets were attained?

3. Who stands to benefit from increased consumption of wildlife viewing as a tourism product and who would contribute marketing dollars to a collective campaign?

4. How much is it realistic and desirable to "invest" in marketing this product in order to achieve a reasonable economic return?

5. Where should emphasis be placed in terms of primary and secondary product in order to get the best return?

6. What wildlife viewing zones should be emphasized?

7. What geographical and motivational markets should be given priority given our knowledge of their potential interest and willingness to consume this product?

8. How should the strategy be implemented and by whom?

9. Are there regions in the province where viewing should be expected to play a major role in regional tourism development?

GROWTH TARGETS

It is proposed that the target for the wildlife viewing marketing strategy should be to double the level of commercial wildlife viewing in British Columbia within 5 years. This requires an annual growth rate of 20% which is that which has been targeted by the Wildlife Branch's Wildlife Viewing Committee. Such an annual growth rate of 20%, while ambitious, is consistent with the expansion that has been associated with other adventure tourism sectors in the past few years. In user-days, this means increasing

commercial wildlife viewing from the current estimated level of 239,400 user-days to 478,800 user-days. If spending patterns remained constant, this would mean an increase in revenue from the current $19 million to $38 million, or an increase of $3.8 million/year for each of the five years.

ECONOMIC RETURN

If the volume of business were to be increased at the rate specified above, incremental gross revenues would total $19 million on the assumption that no improvements were made to per diem expenditures. In 1987, the per diem revenues of primary operators ranged from a low of $45 in frontcountry operations to a high of $200 in the backcountry for an overall average of $79. By increasing the proportionate share of business by mid and backcountry operations, and through the use of improved packaging and the introduction of added value in all zones, the per diem expenditures for both primary and secondary operations could also be increased. If real increases in per diem revenues of 5% per annum were attained in addition to the 20% annual growth rate in volume, the commercial wildlife viewing sector could generate $58 million in five years for an incremental revenue increase of $39 million in constant dollars.

STAKEHOLDERS AND POTENTIAL CONTRIBUTORS

The beneficiaries of this increase in revenue can be classified as direct or indirect. The *direct beneficiaries* are the commercial operators who offer wildlife viewing as a primary product or as secondary to another adventure activity. As discussed in the first chapter, there were an estimated 17 primary operators and 163 other adventure travel operators actively involved in soliciting business and catering to the wildlife viewing market. Many of these businesses are operating at full capacity and have achieved success with their individual marketing efforts. This begs the question — why would they want to contribute additional funds to a collective marketing effort? Given that the existing operators have, in many cases, as much business as they can currently handle, success in doubling demand would require the expansion of existing operations and/or the introduction of new businesses. Since the owners of the latter cannot be identified in advance, it is unlikely that they could be involved in a collective marketing plan.

The *indirect beneficiaries* are much greater in number and include all those sectors of the tourism industry that are linked in some way to the wildlife viewing product (i.e., accommodations, tour operators and wholesalers, airlines, car rental companies, food and beverage outlets, retailers, etc.) Compared to other product lines, however, wildlife viewing will generate a very small portion of overall revenue to these companies and it is difficult to

see how they could become major stakeholders and contributors to a collective marketing effort. Some companies could, however, be approached for sponsorships and advertising in specialty publications.

The Ministry of Tourism and the Ministry of Environment (Wildlife Branch) are beneficiaries and proxy stakeholders given their respective mandates of increasing tourism and promoting public understanding and appreciation of wildlife in British Columbia. In order to attain this latter goal, the Ministry of Environment has recently embarked on a modest publicity campaign to stimulate general interest in viewing wildlife at the viewing sites being developed by the Wildlife Viewing Program.

The marketing strategy aimed at the tourism market and emphasizing commercial opportunities should be lead by the Marketing Division of the Ministry of Tourism. The amount specifically allocated by the Ministry of Tourism to wildlife viewing will be determined by its overall marketing priorities. It is important to remember that wildlife viewing is one of a number of "product-lines" that the Ministry is required to promote (e.g., golf, adventure tourism, group travel, meetings and incentives, attractions, culture and events, etc.) The role of wildlife viewing will have to be assessed in light of the overall marketing objectives of the Ministry. Assuming that the Ministry has set increasing travel to and within the interior of the Province as an objective, then the marketing of wildlife viewing along with other outdoor/adventure products could contribute to attaining this objective.

BUDGET

Given the potential revenue of this sector and its contribution to overall tourism, it is unrealistic to expect that a budget of less than $250,000 should be allocated to reaching the targets of growth outlined above. The following sources and their contributions are recommended:

Ministry of Tourism	70%
Tourism Regions	5%
Adventure Operators	10%
Other Travel Companies	10%
Other Corporate Sponsors	5%

Relative Importance of Primary and Secondary Product
To achieve the target growth level, one of two possible product scenarios can be pursued:

a) The current primary/secondary product mix can be kept constant at 13% primary and 87% secondary. Such a situation means that a major part of the marketing strategy will be to promote secondary product through the enhancement of a range of adventure tourism operations. This would be a continuation of the status quo, wherein wildlife viewing would be presented as an added dimension of the B.C. travel experience, and not as a recognized stand alone product.

b) an increasing emphasis on primary product can be sought through increased marketing focus on primary product offerings.

The route taken will depend on the product development strategy adopted for the sector. While detailed formulation of this is beyond the scope of this report, it is apparent that the creation of new product is linked and even *prerequisite* to the launching of a comprehensive marketing campaign.

An increased emphasis on primary product (the latter option) seems preferable since it stands to produce the most revenue and employment, and is more likely to result in new businesses. While other adventure travel sectors for which wildlife viewing provides secondary benefits are evolving, there are whole primary viewing product types which are as yet undeveloped (e.g. midcountry Grizzly Bear viewing).

It is likely that the very existence of a wildlife viewing marketing strategy will raise the awareness of both prospective clients and operators as to primary viewing opportunities. This will result in the development of new primary viewing businesses. The marketing strategy is based on the assumption that the proportion of primary product will double from the current 13% to 25% of the total mix (as measured in user-days). Table 12 shows the breakdown in user-days at present as established in the Wildlife Viewing Study of B.C. in 1988 and the recommended targets for the next five years.

Table 12
Primary/Secondary Product Mix, Existing and Targeted

	Present User-days	% of Total	Target User-days	Total
Primary	31,500	13%	119,700	25%
Secondary	207,900	87%	359,100	75%
Total	239,400	100%	478,800	100%

Source: Wildlife Viewing in British Columbia, 1988

It is proposed that primary commercial wildlife viewing product be increased by 4 times, and secondary product by nearly 2 times.

PRIORITY BETWEEN WILDLIFE ZONES

To be environmentally acceptable, growth must be linked to the carrying capacity of the resource in each of the Wildlife Viewing Zones. As indicated in section 2.2, the frontcountry has the greatest resilience to accommodate growth and the backcountry the least. Currently, the distribution of wildlife viewing primary product by zone is as follows:

Table 13
Existing Primary Wildlife Viewing Zonal Distribution

Frontcountry	22,300 user-days	71%
Midcountry	1,000 user-days	3%
Backcountry	8,200 user-days	26%
Total	31,500 user-days	100%

Source: Wildlife Viewing in B.C., 1988

The most noticeable feature is the lack of midcountry product. Given the intermediate environmental resilience and daily product value of this zone, a priority of the marketing strategy (in tandem with a wildlife viewing development strategy) should be to significantly increase the share of commercial viewing in the midcountry. Midcountry viewing opportunities will develop as, for example, more guide outfitter, fish camp and small resort

operators become familiar with wildlife viewing tourism. Development of more viewing sites in this zone will also help. The emphasis of key midcountry sites such as the Junction Country California Bighorn sheep will enable new product to be brought on line and marketed. It should be noted, however, that while the development of sites can increase awareness, they need to be positioned in such a way that they do not create direct competition with commercial operators.

The current proportion of viewing activity in the frontcountry can and should be maintained but, wherever possible, the per diem expenditures should be increased. Aggressive marketing of bus, van tours, and self-directed automobile tours (using rental as well as personal vehicles) to the B.C., Pacific Northwest, California and Alberta markets should be a priority. As well, increased usage of frontcountry sites can be achieved by developing viewing packages linked to business conferences, particularly in southwestern B.C., and to international travellers in the vicinity of destination resorts such as Whistler. Development of more interpretive centres, roadside viewing platforms and walkways will facilitate growth in the frontcountry zone.

By contrast, the backcountry zone is too environmentally fragile to accommodate significant increases in viewing use. It is recommended, therefore, that increased usage in the midcountry be balanced by a reduced emphasis on backcountry sites. As a consequence, primary user-days in the backcountry are expected to double over the five year period whereas user-days in the midcountry could increase by as much as eighteen-fold (see Table 14).

In summary, the marketing strategy — and associated product development strategy — should be geared to providing the following mix for primary operators:

Table 14
Proposed Primary Wildlife Viewing Zonal Distribution

Frontcountry	83,790 user-days	70%
Midcountry	17,955 user-days	15%
Backcountry	17,955 user-days	15%
All Zones	119,700 user-days	100%

These growth targets will mean expanding the amount of product line offered. Table 15 identifies the product areas currently being offered as well as those which according to *Wildlife Viewing In B.C., 1988* are not yet provided (e.g., midcountry Grizzly Bear viewing).

Table 15
Existing Compared to Potential Product Offerings by Zone

	Frontcountry		Midcountry		Backcountry	
	Existing	Potential	Existing	Potential	Existing	Potential
Grizzly Bears	nil	nil	nil	major	nil	minor
Raptors	minor	major	nil	major	nil	minor
predators	nil	nil	nil	nil	nil	minor
waterfowl	minor	major	nil	nil	nil	nil
songbirds	nil	nil	nil	nil	nil	nil
sea mammals	major	major	major	major	major	major
montane wildlife	minor	major	minor	minor	minor	major
small mammals	nil	minor	nil	nil	nil	nil
spawning fish	minor	major	nil	minor	nil	nil

Source: Wildlife Viewing in B.C., 1988

MARKET PRIORITIES BY GEOGRAPHICAL ORIGIN AND MOTIVATION

The following markets have been prioritized based on both their long-term development potential, current levels of visitation and expenditure patterns. For example, visitors from Ontario spend more per day than visitors from elsewhere, generating 22% of British Columbia's non-resident tourism revenue. Many are travelling on business but have shown an interest in combining business with pleasure. While California contributes 9% of the revenue, the *U.S. Pleasure Travel Study*, 1985 has shown that interest in wildlife ranks relatively low for this market. British Columbia faces stiff competition from U.S. destinations such as Alaska, Wyoming and Oregon for those Californians who have a specific interest in wildlife viewing opportunities. Based on the current importance of each geographical market to the wildlife viewing sector and the available research regarding their interests as outlined in Chapter 6, we recommend focussing on the five markets shown below, in the following order of priority:

1. British Columbia
2. Ontario and Eastern U.S and Canada
3. Germany, United Kingdom and France
4. Washington and Oregon
5. California

The British Columbia Market
In this market, the strategy should integrate with and pick up the momentum established by the Ministry of Environment's Wildlife Watch campaign. In addition to making residents of the Province aware of wildlife in general, the focus of the marketing effort should be to provide timely and attractive information concerning commercial opportunities that show the extra value to be gained from taking a guided tour. Front and midcountry packages of short duration would meet the growing trend for mini-vacations and "escapes" while backcountry experiences would be marketed to the "committed adventurer" through specialty publications, outdoor clothing retailers and clubs and associations.

Ontario, other Eastern Canada and Eastern U.S.
Visitors from these areas represent a growing and important market for British Columbia. They tend to fly to Vancouver and spend much of their time in Southwestern B.C. and Vancouver Island. Visitors from Ontario are very likely to be combining business with pleasure and, because of the difference in wildlife compared to Eastern Canada, may be interested in short, modular packages offered as pre and post business/conference activities. A growing number of business travellers stay in a community over the weekend in order to take advantage of price discounts on airfares. Depending on time schedules, some of these short packages could be extended into 3-5 day trips into the mid and backcountry and will likely involve other adventure opportunities such as fishing, hunting, photography and trail riding. Ontarians are relatively frequent visitors to British Columbia — as many as 51% of the 820,000 Ontario visitors had made at least three trips to the province over the last three years (*Visitor '89*). This presents an opportunity to market wildlife viewing opportunities for subsequent return trips. This market has been ranked second because of its size and long-term potential together with the fact that existing operators would find it hard to penetrate this market on an individual basis.

Germany, United Kingdom and France
Interest in wildlife and awareness of Canada's strengths in this regard is very high in Europe. Europeans, and Germans in particular, have shown a strong propensity to travel extensively within the interior of the province. There is a strong German market for fly-drive vacations using recreational vehicle rentals in Calgary and Vancouver and opportunities for expanding user-days in all wildlife viewing zones is strong. Generally speaking, wildlife viewing is combined with a number of other adventure activities, notably hiking, trail riding, and river rafting. The European market can be subdivided into several sub groups and each should be approached somewhat differently. The first time visitor is likely to be the casual adventurer and to have neither the time nor the interest in purchasing extended trips into the backcountry. Instead they will be interested in a variety of modular packages of various lengths and combinations with Vancouver as the gateway. Experienced

travellers are more likely to be interested in back and midcountry offerings. Much of this product can be sold through receptive tour operators.

Washington and Oregon

Of all our non-resident visitors, residents of Washington and Oregon show the greatest propensity to be visiting British Columbia in order to participate in an outdoor/ recreational activity (11% and 15% respectively). In terms of numbers they are probably the largest source of visitors interested in the outdoors - over 178,000 visitors from these two states claimed to be on an outdoors trip. They are also the most likely to be travelling by motor vehicle and to be camping. As a consequence, their per diem expenditures are comparatively low. Since visitors from these states are probably better informed about British Columbia's geography than visitors from other parts of the United States, an opportunity exists to increase user-days in all zones. The emphasis in these markets should be similar to that used for British Columbians (i.e., to persuade them that the purchase of a guided package will yield significantly more enjoyment and vacation value than independent viewing).

The California Market

British Columbia currently hosts over 680,000 Californian visitors each year and much of the province's marketing effort is targeted to this affluent market. There are two sub-markets within the Californian market that should be targeted - those who are on a touring trip (43%) and those who visited British Columbia specifically for an outdoor recreational/wilderness experience (8%). The former group tend to be predominantly using a car or R.V. to travel to and within the Province. Many are en route to Alaska and some 44% are over 55 — an age market to which many B.C. operators have successfully marketed. It is likely that the touring market will have only limited knowledge of the wildlife viewing opportunities available to them so their length of stay in British Columbia could be extended, along with associated expenditures, if wildlife viewing opportunities were better communicated.

The second sub market is most likely to comprise the "committed and expert adventurers", many of whom will be somewhat knowledgeable about British Columbia's wildlife resources. Informative articles in specialty magazines, inclusion of wildlife viewing product in adventure-oriented tours developed by major wholesalers and selective advertising in specialty magazines (e.g., Specialty Travel Index), offer the best marketing opportunities.

There is a growing third market — Californians taking fly-drive vacations using Vancouver as their gateway. This market could be interested in frontcountry viewing opportunities (e.g., a guided tour of Pitt and Harrison lakes to view bald-headed eagles, a trip over to Vancouver Island to watch Orca's), that are sold on a modular basis.

STRATEGIC GOALS AND OBJECTIVES

Based on the strategic considerations outlined above, a collective marketing plan for wildlife viewing in British Columbia should be designed to achieve the following:

1. Increase the revenue generated by primary and secondary wildlife viewing from $19 million to $58 million over five years.

2. Increase the average per diem expenditures spent on primary opportunities from $79 to $100 per day in constant dollars.

These goals can best be achieved through attainment of the following objectives:

1. Position British Columbia as having a diverse, world class wildlife viewing resource.

2. Increase awareness among consumers and the travel trade of the primary, commercial viewing opportunities available in British Columbia.

3. Increase and improve the amount and variety of attractive tour packages that add value to the experience of wildlife viewing.

4. Enhance the role and value of wildlife viewing as an added feature of other tourism products, especially adventure tourism and general touring.

5. Stimulate the development of new businesses offering primary product, especially in the midcountry zone.

Each of these objectives will require implementation of a series of tactical action steps. The following tactics are recommendations and suggestions only, and can be refined and modified depending upon the stakeholders that contribute to the plan and their specific agendas and objectives. In many cases, the same tactic or action can be used to achieve multiple objectives.

Objective 1:
Position British Columbia as having a diverse world class wildlife viewing resource.

The Ministry of Tourism can take the lead in attaining this objective as its primary mandate is to develop generic awareness of British Columbia as a destination. The Super Natural theme is well recognized and complements

the wildlife viewing product. While wildlife has been featured in many award winning advertising campaigns of the past (e.g., Orcas in Robson Bight, deer in a forest), there has been no conscious intent to promote wildlife viewing as a specific product. As discussed in Chapter 4, Alaska and Wyoming, on the other hand, have used wildlife as a strong "drawing card" and, as a consequence, have been able to capitalize on strong societal concerns regarding environmental degradation and wildlife preservation.

Tactics

1. Under the Super Natural theme, develop an advertising campaign that presents the diversity and magnificence of British Columbia's wildlife product and ecological settings.

   British Columbia's strength, compared to the competition of Alaska, is its accessibility and ecological diversity. This "point of difference" should be stressed in promotional campaigns.

2. Since British Columbia is not perceived as having a sufficiently "exotic" image to attract the attention of the travel trade, it might be advisable to use well known celebrities to create a credible, established image (e.g., Robert Bateman, Farley Mowat, Jacques Cousteau, or David Suzuki).

3. Place consumer-oriented advertisements in the following publications:

   Sunset Magazine
   Outside
   National Geographic Traveller
   Canadian Geographic
   Outdoor Photographer
   Nature Canada
   Seasons
   Sierra
   Real Travel
   Equinox

   Interested readers would be invited to phone the Ministry 1-800 number and ask for the wildlife viewing kit described under Objective 2 below.

4. Undertake an aggressive campaign to invite well known travel writers to experience the British Columbia wildlife viewing product. Writers from two kinds of magazines should be selected: those that influence travel trends and appeal to the better educated, affluent traveller known to be looking for more exotic, but softer forms of travel products (e.g., Conde Nast, National Geographic Traveller, Travel and

Leisure), and those specialty magazines targeted at the "expert" or "enthusiast" (e.g., Sierra, Nature Canada, Outdoor Photographer), General interest magazines such as Equinox could be encouraged to do investigative articles on the expansion of wildlife viewing in B.C. This initiative should be coordinated with the Ministry of Environment's efforts to promote the Wildlife Watch program. The Ministry of Environment should be consulted regarding the sites chosen for articles as they are in the best position to assess which sites can withstand increased use.

5. The production of major commercial movies are known to have a significant impact on creating awareness of new destinations. The movie "Out of Africa" and "Gorillas in the Mist" did much to stimulate travel to Africa. The opportunity to attract a feature film with a wildlife theme to be made in British Columbia could have an enormous impact on the perception of British Columbia as an "exotic" destination.

Objective 2,
Increase Awareness Among Consumers and the Travel Trade of the Primary Commercial Viewing Opportunities

While objective 1 is designed to raise awareness and interest, this objective deals with the provision of information and collateral that will stimulate decisions to purchase.

Tactics

1. Develop fulfillment material. A multi-purpose 8-page, four colour Guide to Wildlife Viewing opportunities is recommended that could either be inserted in the Ministry publication *Outdoor Adventure Vacations*, or distributed separately at trade and consumer shows, and presentations to retailers. This guide would highlight the different ecological settings, provide strong visual images, some "hard information" about species and specific information regarding available packages. It should include site and general information materials prepared under the Wildlife Watch program. It could be supported by advertising from the private sector operators. Its purpose and role would be to reinforce the image of British Columbia as offering diverse and world class opportunities to watch wildlife. It would comprise a directory of all primary operators and those adventure operators whose product highlighted wildlife in their product presentation. It would be designed to complement the Ministry of Environment brochure which is scheduled for Spring '91 and which will be distributed via Tourism Info Centres. The latter publication is directed at residents and independent travellers interested in non-commercial viewing opportunities.

2. A province-wide photographic competition with professional and amateur entry categories could be organized with a major commercial sponsor such as Kodak or Fuji and/or camera manufacturers. Winning entries could form the content of a glossy book on Wildlife Adventures in British Columbia that could be sold with the proceeds divided equally between wild-life management projects and subsequent marketing campaigns.

3. In order to encourage the touring market, which remains British Columbia's largest market, to extend their stay, wildlife viewing sites should be shown on the Travel Planner and the provincial road map, along with a brief description of species and seasons.

4. A mobile exhibit highlighting British Columbia's diverse wildlife and ecological environments could be developed as a cooperative effort between the Ministry of Tourism, the Wildlife Viewing Branch and the Parks Branch. This exhibit, along with supporting collateral material, could be set up at major consumer shows, such as the Anaheim Sport show and the Toronto Sportsman show, at little additional cost for the exposure received.

5. Scripts and supporting slides should be developed to enable speakers to make presentations to a variety of nature-oriented groups and associations in key cities. The following types of provincial and regional organizations should be approached as each have chapters with fairly large memberships:

   - naturalist organizations such as the Canadian Nature Federation;
   - wildlife organizations such as the Federation of B.C. Naturalists ; and
   - conservation organizations (e.g., Sierra Club).

   Much of the same material could be adapted to make a presentation kit to retail agents in selected cities.

Objective 3
Increase and Improve the Number and Variety of Attractive Tour Packages that Add Value to the Experience of Wildlife Viewing

Given that many providers of primary product are operating at or near capacity, there is a need to develop more product, particularly in the front and mid country.

Tactics

1. Develop and maintain a list of receptive tour operators, adventure tourism suppliers, guide/outfitters and non-resident tour operators currently promoting and selling inbound tour product. These companies should be surveyed to identify which are interested in handling and/or being informed about wildlife viewing opportunities for their clients.

2. In order to develop new itineraries and new products, tour operators need a lot of information which is often expensive and time consuming to compile. By supplying relevant information to such operators in an attractive and timely fashion, much can be done to stimulate the inclusion of wildlife viewing opportunities in tours. Discussions with receptive operators handling the inbound market from Europe suggest that the consumer is looking for flexibility and variety. They need information on a number of tour opportunities ranging from an afternoon's van-based viewing experience, through to a five day kayaking trip to see whales.

   Information required by tour operators include

   - slides and photos of animal species;
   - routes to watch for them;
   - identification of wildlife centres, refuges and viewing centres;
   - information about the animals, their diet, gestation;
   - seasonal viewing opportunities;
   - viewing ethics; and
   - information on support facilities (lodging, food service, etc.).

   Increased resource information will provide potential product developers with a library of material form which to draw. This will assist them in increasing the profile of wildlife viewing in their printed material and have the backup information needed to service the client on the viewing site. This information should be developed in close collaboration with personnel from the Ministry of Environment.

Objective 4
Enhance the Role and Value of Wildlife Viewing as an Added Feature of Other Tourism Products

The opportunity to view wildlife "adds value" and enjoyment to a number of other tourism products (e.g., adventure tours such as hiking, sail cruising, kayaking, bicycling), as well as more traditional tourism activities such as independent or group touring.

Travel research on consumer preferences has demonstrated that today's travellers are hungry for information about the sites they are viewing and experiencing. The 1988 study *Consumer Demand for Wildlife Viewing in the Yukon* , noted:

> "Interpretation, education and entertainment can all be made part and parcel of wildlife viewing with a little imagination. The market research indicates that visitors are starving for information on wildlife viewing and that this information can be presented in an interpretive, educational and/or entertaining manner.....
>
> Interpretation for highway travellers has evolved beyond the roadside pullout and sign approach. Entire regions and highways can be presented as thematic tours with identified stops linked by a companion tour volume. The entire landscape can be interpreted and highlighted -- vastly increasing the interest and satisfaction of the visitor. Wilderness guides and park naturalists alike have noted that visitors respond enthusiastically when apparently mundane features of the landscape are shown to be interesting and unique. In other words, Yukon has much more to interest visitors than a cursory "wildlife spectacle". Even a roadside bog is intriguing to people from the south when they understand permafrost. An "ordinary gopher" becomes exotic when it is introduced as an Arctic Ground Squirrel. "

Tactics

1. The Ministry of Environment and the Ministry of Tourism should work together to develop a number of interpretive tools that would enhance the visitors enjoyment of wildlife viewing sites. These tools should emphasize the total viewing experience by explaining not just the animal species but also the habitat and ecosystem context within which they occur.

2. In order for existing adventure operators to enhance their client's experience and to develop "value added" packages, a directory of practical information could be prepared as follows:

   - names and addresses of freelance photographers interested in putting on courses in the outdoors
   - names and addresses of freelance naturalists and interpreters
   - information on species and habitats
   - a photobank for use in promotional material

3. Development of a master mailing list of tour operators and agencies known to be interested in outdoor product.

OTHER MARKETING CONSIDERATIONS

Regardless of the precise positioning and marketing mix selected by the government and the wildlife operators for encouraging growth in this sector, the following recommendations should be incorporated:

The Wildlife Viewing Marketing Strategy Should Be Linked To Local Opportunities

Wildlife viewing tourism often focuses on local viewing opportunities which can be of significant tourism value to adjacent communities. For example, the Creston Valley Wildlife Interpretation Centre plays a key role in the tourism economy of Creston. Similarly, Elizabeth Lake at Cranbrook and Somenos Lake at Duncan are waterfowl sites which are being developed by the local communities. It is recommended that the B.C. wildlife viewing marketing strategy be structured so as to reinforce such local community wildlife viewing opportunities.

Wildlife Viewing Marketing Should Street Safe Viewing Practices

Unsafe viewing of wildlife can lead to hazards - both to people and animals. As well, safety problems can undermine economic well-being of the viewing industry and its marketing image. A key aspect of the marketing campaign must be to depict the activity as a safe one when prudent practices are respected. Accordingly, information materials should clearly explain such safe viewing practices.

Wildlife Viewing Marketing Should Provide a Comprehensive Product Representation

The marketing of wildlife viewing should not focus solely on individual species, but also stress the biological diversity and habitats found in British Columbia. Such an approach will increase viewer satisfaction - even when the sought after species are not actually seen - and lead to a richer and more informed experience.

The Wildlife Viewing Marketing Program Must Be Designed To Be Environmentally Sensitive And Appropriate

It is fundamental that the environmental integrity of the wildlife viewing resource is protected by the design and delivery of the marketing strategy. Wildlife and its habitat is important to society beyond the value to the viewing industry. It is government's role to ensure that the resource is husbanded. In working with industry, this means that government should

lay out management regulations. As well, it should ensure that support services to industry (not just marketing, but also financial, research, training) are environmentally appropriate (as detailed in Chapter 2). Since tourism growth can be rapid, wildlife viewing impact assessment and avoidance strategies should be undertaken and acted upon prior to marketing activities.

Appendices

APPENDIX A. LIST OF CONTACTS

1. Ground Operators, Guides/Outfitters

Palliser River Outfitters	Linda Tegart	Radium
Northland Adventure Group Ltd.	Dennis Gaetz	Quesnel
Garrard & Sons Outfitters	Marg. Garrard	GoldBridge
Sea to Sky Tours & travel	Virginia Meachin	Vancouver
Pacific North Holidays Inc.	Pat Avis	Vancouver
Adventure Canada	David Freeze	Vancouver
Great Expeditions	Fraser McLean	Vancouver
Babine Norlakes Lodge	Pierce Clegg	Smithers
Beach Gardens Resort	Joan Barszczewski	Powell River
Roche Lake Resort	Bob Balfour	Kamloops
Tyax Mountain Lake Resort	Gus Abel	GoldBridge
Tatlatui Wilderness Adventures	Bob Henderson	Smithers
Whistler Mountain Ski Corp.	Bea Searle	Whistler
B.C. Ferries	Erin Caldwell	Victoria
Northern Sun Tours	Karen & Roger	Smithers
One Eye Outfit	Mike McDonough	Williams Lake
Heli-Hiking	Roger Madsen	Invermere
The Pathways Tour Company	Chris Harris	100 Mile
Canadian River Expeditions	John Mikes Jr.	Vancouver
Gulf Island Kayaking	Nicole Gross	Galiano Island
Kumsheen Raft Adventures	Bernie Fandrich	Lytton
Pacific Synergies Ltd.	Irene Whitney	Whistler
Pacific Rim Wilderness Adventures	Brian Fryer	Port Alberni
Canadian Princess Tours	Karen Miller	Victoria
Stubbs Island Charters	Anne Borrowman	Telegraph Cove
Whale Centre	Sheri Bondi	Tofino
Swiftsure Tours	Marilyn Lambert	Victoria
Hummingbird Nature Tours	Robyn Tagles	Maple Ridge
Ptarmigan Tours	Art Twomey	Skookumchuck

2. Support Agencies and Resource Specialists

B.C. Parks Wildlife Specialist	Greg Jones	Victoria
Okanagan-Similkameen Tourism Assoc	Deanna Rainey	Kelowna
North by Northwest Tourism Assoc	Greg Meredith	Smithers
Min. of Tourism, Director Marketing	Bill Shilvock	Vancouver
Min. of Tourism, International Marketing	Donna Brinkhaus	Vancouver

3. Inbound, Wholesale and Retail Operators
(National and International)

Adventure Travel Centre	San Francisco
Student Travel Network	San Francisco
Community Travel Network	Oakland
Mountain Travel	Albany
Emporium Travel	San Francisco
Travel Time	San Francisco
Now Voyager	San Francisco
Global Expeditions	Ontario
Venue West Conference Services	Vancouver
Specialty Tours	Colorado

APPENDIX B. EXPLANATION FOR WILDLIFE VIEWING ANALYSIS

Options for wildlife viewing were compared using the following analysis:

Four groupings of attractions were analysed.

1. Large mammals (from Grizzly Bears to Elk).
2. Small Mammals (from Deer to small Cats).
3. Other species (sea mammals and birds).
4. Systems (the kinds of scenic circumstance that the animals can be found in).

Each species or species group was rated on a scale of one to five, with truly exceptional animals or groups rated at ten. There is a total possible score of 155 for the animals with an additional 70 points for the system analysis.

The analysis was based on the following rating:

0. Species or species group not found.
1. Species occurs, but is uncommon.
2. Species is common in a few isolated areas.
3. Species is common and well distributed.
4. Species is common and of special interest.
5. Species is common and this jurisdiction is one of only a few places where it can be viewed.

10. Species or species group that is exceptional, of general interest (Grizzly), and are unique to a specific jurisdiction.

The intent here was to provide a general analysis of viewing opportunities in different jurisdictions, to reflect the interest of general viewers. Thus, large mammals are weighted more heavily than birds. The scenic background for viewing is also important to viewing and is also given consideration.

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